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ABSTRACT

Provided for Developmental Disabilities Councils is a resource handbook on planning orientation training for council members. The material, including three major presentations on orientation planning, advocacy, and orientation principles, is explained to be drawn from three 1975 regional conferences. Among training techniques analyzed are use of a case study, force field analysis, and videotaping. Included is a guide for designing and implementing orientation activities. Appended are conference agendas and evaluation reports as well as an annotated resource list. (CL)

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TRAINING FOR DD COUNCIL ORIENTATION

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Prepared and Distributed by the Developmental Disabilities Technical Assistance System at the University of North Carolina at Chapel Hill

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PREFACE

This report is an outgrowth of three successful Developmental Disabilities Technical Assistance System (DD/TAS) and National Conference on Developmental Disabilities (NCDD) Orientation Training Conferences held late last summer. Sixty-six Council representatives from 37 Councils attended these Conferences. As a result of requests from participating State Councils, DD/TAS has compiled a resource handbook from the Conference material. We hope that this compendium can be used as a reference tool for planning future Council continuing education experiences.

There are six major sections to this handbook. The first serves as an introduction, while the second one features the content of three major Conference presentations. Section three provides descriptions of a variety of training techniques. Planning for orientation training is the focus of the fourth section. Finally, sections five and six of the handbook deal with the current status of Council orientation training activities and supplemental Conference information.

Before closing, recognition is in order for the fine reporting by our Conference resource people. Without their assistance, the preparation of this handbook would have been impossible. We are indeed grateful for their contributions.

If questions arise after reviewing this material or if there is feedback about it, please feel free to contact us at DD/TAS.

J.P.
P.T.
J.A.

DD/TAS
Chapel Hill, NC
March 1976

introduction

INTRODUCTION TO ORIENTATION TRAINING

Ronald Wiegerink

Rationale

One persistent need of Developmental Disabilities Councils has been to orient its members and significant other people to the Developmental Disabilities Program. This need has been partially met by a variety of Council strategies: most commonly, a series of reading materials and/or one or two-day workshops. Because DD/TAS and NCDD were often confronted with this need, it was assumed that these practices were not sufficient and that new strategies had to be developed.

During the spring of 1975, DD/TAS requested funds from HEW to conduct a series of Orientation Training Conferences to meet this need. The goal of the series was to develop an ongoing system for responding to orientation needs as they appeared and were identified by Council members. A planning framework was presented to the Executive Committee of NCDD who heartily approved the concepts involved and offered to sponsor the events jointly with DD/TAS. A Planning Committee of DD/TAS staff members plus Dale Engstrom, Allen Cohen, and Jane Belau from NCDD was given the responsibility of planning the Orientation Training series.

The Planning Committee decided to focus on training and supporting two-person teams from each State Council in developing ongoing orientation activities for their state. It was requested that Councils send persons who were already substantially familiar with the DD Program. Thus, the task was to develop and identify methods and materials that would assist these people in developing and conducting an ongoing orientation process for their Council. Such a process, once in place, would constantly orient new members, e.g., legislators, agency personnel, as well as deal with new issues.

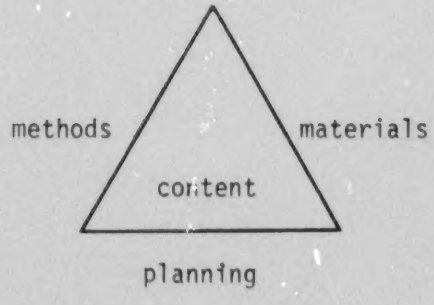
Goals and Sites

The goals established for the three Orientation Training Conferences were: (1) to explore orientation techniques and methodologies, (2) to introduce a kit of materials for orientation developed and compiled by DD/TAS staff, (3) to assist the Council teams in identifying their Councils' orientation needs and developing a plan to meet these needs, and (4) to prepare for needed follow-up. The first Conference was held in Chapel Hill on August 5-8. The second one convened at Timberline Lodge outside of Portland, Oregon from August 19 to August 22. Pheasant Run, near Chicago, was the site for the final Conference. It started on September 9 and ended on September 12. (See Appendix I)

Focus

The focus of the Orientation Training Conferences was to introduce the teams to orientation strategies rather than to the Developmental Disabilities

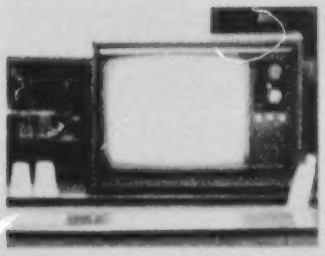
Program itself. Orientation was considered to have at least four aspects:



The Conferences used Developmental Disabilities content as a basis for focusing on training methods, materials and planning. The Conferences explored a variety of techniques: a videotape, lectures, role play, case studies, round robin discussion, interviews, problem solving, dramatizations, simulations, and small group planning--in an attempt to provide the teams with a variety of communication strategies from which to choose in conducting their orientation programs. Additionally, print materials were widely distributed (See Appendix II) at the Conferences.

It is the hope of DD/TAS staff and NCDD Executive Committee members that these efforts were well conceived, well carried out, and have produced results. (Refer to Appendix III)

presentations



PLANNING FOR ORIENTATION*

Eugene Watson
School of Education, UNC-CH

*This is a transcript of Dr. Watson's Conference presentation.

Very often when I work with organizational planners, we develop a PERT chart, a system for planning and for implementing plans. For DD Councils, I would suggest a simple "POT" chart, for Planning Orientation and Training. I ask you to accept the premise that these terms--orientation and training--should be considered together and not differentiated. There may be considerable variation in the level of content in an orientation program as compared with that of a training program, but if you can accept the need for a continuing education commitment on the part of your Council, we probably will be talking meaningfully and "on the same wave length" in this discussion. The objectives are for the participants:

(1) to experience and be able to describe an involvement learning model that is characteristic of this Conference;

(2) to discuss a rationale for planning continuing orientation/training;

(3) to outline or discuss some of their basic perceptions of their Council and its current orientation/training program;

(4) to identify and discuss basic steps in planning orientation/training; and

(5) to discuss the proposed relationship of the process of this Conference to their back-home applications in orientation/training.

In work with professional and volunteer organizations throughout the eastern United States, I have developed some basic assumptions about Councils and boards. One is that their approach to orientation very often can be summarized by the following statement: "Here is how we do things, and here is what is expected of you." Training for carrying out a role as a member of a Council too often can be summarized by the following: "Here is how we do it; here is what is expected of you; here is how you do those things that we expect of you." In considering the first statement, I would suggest that orientation should be a more ambitious process. Orientation should include a status picture of the organization--what has been, what is, and current resources for doing things. Consider training as the presentation of possible new uses of resources and development of new potential resources. In a sense, I am advocating role expansion of Council members, rather than trying to fit Council members into predetermined slots.

In order to collect data to use in considering this view, I ask you to please take a few minutes and honestly respond to an instrument which focuses your perceptions of what has been true or what is true in your Council. This is not an evaluation form and the items are not sacrosanct. The statements on the instrument were drawn from the experience of a number of people who have worked with Councils; they are very general and may not represent exactly what Councils should be doing. (Refer to Inventory of Perceptions on page 13)

After completing the instrument, partners may wish to get together, discuss, and compare perceptions of their own Council. Are there wide discrepancies? How can we best understand or reduce them?

An Inventory of Perceptions of the Basic Status of Councils*

	Very much like my Council	Much like	Somewhat like	Not much like	Not at all like my Council
A. The Council is made up of individuals who supplement one another's abilities	1	2	3	4	5
B. The Council represents the interests which are to be consulted in formulating policy.	1	2	3	4	5
C. The Council is large enough to handle necessary responsibilities, but small enough to act as a deliberate group.	1	2	3	4	5
D. A basic structural pattern for decision making (e.g. executive committee, other committees, staff, or whatever form) exists.	1	2	3	4	5
E. (Respond to this if a decision-making pattern exists). The structural pattern is clear to the Council membership.	1	2	3	4	5
F. The members of the Council understand the goals and purposes of the Council and how they are to be achieved by the activities undertaken.	1	2	3	4	5
G. The Council has a climate of social ease and rapport.	1	2	3	4	5
H. Members of the Council appear to feel involved and interested in its work.	1	2	3	4	5
I. Decisions on policy are made only after full consideration by all parties directly affected by the decisions.	1	2	3	4	5
J. The Council makes certain that effective community relationships are maintained.	1	2	3	4	5
K. The Council has a sense of progress and specific accomplishment.	1	2	3	4	5
L. The Council has a continuing educational program for new and "veteran" members.	1	2	3	4	5

*Adapted from materials developed by Cyril O. Houle, University of Chicago.

The purpose of this type of form and exercise is to assist you in viewing your Council as an organism; a sort of precursor to Orientation-Training Planning. There are some other things you might see as crucial factors in the life of that organism. You may want to think of your organism as a whole, more broadly than the instrument implies, as you progress. Please retain these forms to refer to as you go into your later Conference sessions on planing for back home.

Now, let us review what some of the Conference participants listed as outcomes of this exercise. More specifically, let's list the activities that should be included in Council orientation-training activities:

(1) An immediate welcome from the top Council officers in person, or by phone or letter.

(2) Special individual Conferences with the chairman or staff planner on the work of the Council and current membership.

(3) Regular orientation for new members. If the group is large, regular orientation as a group.

(4) Experienced members serving as sponsors for each new member.

(5) Planned social activities, very early and periodically.

(6) A packet of materials on the Council and its work presented very early. The packet of materials not only would include material on status of the organization, but some provocative, stimulating items about future possibilities and potential.

(7) Meetings with other similar groups. A good way to orient is to bring your Council to meet another Council. Of course, for many of you that will be prohibitive, because of distance.

(8) Early involvement of each member in specific tasks of the Council--not busy work--at a level appropriate to his or her skill and understanding. The effective way to do that is to find out what resources they have to offer, requiring early assessment of what they bring to the situation.

Those persons in charge of Council orientation-training often do not recognize early involvement of new Council members as one of the most effective means of orientation-training. They often fail even to involve veteran members adequately in orientation-training efforts of other members. An all-too-frequent approach is to ask an outside expert or consultant to come in and work with new or continuing Council members in the name of orientation-training. The planning for such presentations by outside speakers or consultants very often involves limited contacts and a wide range in quantity and quality of information given to the person who is to come in and help with orientation-training. The following different approaches to "planning" have been experienced by many consultants or individuals contacted to speak as part of an orientation or training program. Consider that each of these statements is the essence of the initial telephone or written communication

with the potential outside resource person:

A. "Who can we get to talk to our group at the next meeting?"

B. "Come and talk to us. Anything you want to say will be helpful, I'm certain."

C. "I think we need someone to talk about the legislative situation. Would you do it or suggest someone?"

D. "We want you to talk to us about the legislation currently proposed, since you have been very active in supporting it and have indicated that you are well prepared to discuss its advantages and disadvantages for Councils such as ours."

E. "Our group was surveyed about our learning needs. We have placed high priority on a presentation by you on needed legislation. We have questions we want to raise with you about your stance. You can have a full hour for the presentation, with an additional hour, if necessary, for questions. I will send you a list of statements of our current questions and some information about our Council."

F. All of the above in "E", except delete time specified and add: "After you have read the materials, could we meet to discuss the focus, content and methodology of the presentation before you begin your final preparation? A small representative sub-group of our Council will be available to meet with you."

The systematic planning of orientation-training is our emerging focus. In order to pursue it, I will ask participants to form small groups to consider possible factors in systematic planning. These factors are suggestions that people have made--possibilities within the planning process. We will give you a brief printed outline to consider and will divide you into groups on a count-off basis. Each group will have a slightly different task, but the procedure in each group will be the same. Everyone in a specific group will get the same list of factors. Discuss the items on the handout slips. Start with the view that you can reject the basic statement for the task if you wish. If you find that the topic you are given is not an acceptable topic, or you do not find it to be relevant, substitute a topic. Then arrive at a general statement of group responses. After you have worked on the task, come back to this room at the end of the designated time. The first thing is quickly to select a recorder to report back to us here, with summary comments about the thinking of the group. After the groups have returned and reported, we will have begun our work of identifying crucial steps in planning for back home orientation-training efforts. Each group will have one of the following topics, with related questions to focus discussion:

A. <u>Orientation-Training Need Assessment</u>

1. Is need assessment a crucial step in planning orientation-training?

2. Is it being done by the Councils represented in your group?

3. What are some examples of what it is and how it is conducted?

B. Target Audience for Orientation-Training?

1. Is early identification of target audiences a crucial step in planning orientation-training?

2. Are target audiences identified and dealt with separately or uniquely by Councils represented in your group?

3. What are some examples of different target audiences, how they are identified, and how they are dealt with?

C. Purposes of Orientation-Training

1. Should the purposes of orientation-training be stated clearly and fully for all who are involved before such activities take place?

2. Are the purposes of such activities clearly and fully stated in Councils represented in your group?

3. What are some examples of statements of different purposes for Council orientation-training?

D. Resources for Content Development and Implementation

1. Should the identification of a variety of resources for content development and implementation be considered a crucial step in planning orientation-training?

2. Is the above done in Councils represented in your group?

3. What are some examples of various resources utilized by Councils represented in your group?

E. Implementation Activities for Orientation-Training?

1. What are types of implementation activities to be planned for orientation-training?

2. What are examples of the implementation activities typically included in planning for orientation-training in your Councils?

F. Personnel Responsible for Implementation of Orientation-Training

1. Should responsibility for implementation of orientation-training be widely distributed within a Council?

2. On what basis should such responsibilities be assigned?

3. Give examples of the assignment of such responsibilities in the Councils represented in your group.

The small groups met, then returned for a general sharing to conclude the session. All of the factors were considered crucial for planning and implementing Council orientation and training activities.

ADVOCACY*

Donald Stedman
Frank Porter Graham Center, UNC-CH

*This is a transcript of Dr. Stedman's Conference presentation.

This is a brief presentation which I always enjoy giving. It has been variously characterized as a prayer meeting, a depressive episode in an otherwise exciting conference, a flight into fantasy, or a mind-jogger. Now let me tell you why we do this. It's important, as you've noted throughout our Conference, to put some levity and variety into the way we approach things. The day-to-day, week-to-week problems in this business are tough. I'm hopeful that this experience won't be just a skin graft that doesn't take. Some of it you can integrate into your head. The fundamental point I'd like to make is that there are a large number of people out there who have to have somebody to speak up for them. That's part of advocacy - jumping up front, taking a lead - and a risk. We have to be the largest group of risk takers in the country. Do you understand the product that we are trying to sell? The majority of the public think that what we are trying to sell is obnoxious. That is not an overstatement. We are starting from below zero with the product that we are trying to sell. This country is hooked on success, and you will talk about people who are easily characterized by the uninformed as incompetent. You are talking about someone they don't want to hear about.

The public stereotype of the handicapped person is still primarily that of the institutionalized, multiply-handicapped person way out in the piney woods, in one of those great big old institutions. That's the average response you'd get if you walked out front on Main Street, and stopped every twelfth person and said "My cousin has cerebral palsy, would you try to describe my cousin?" They'd describe a little child with braces that has to be in an institution - white coated doctors hovering over it. That's the public's image. "My uncle is mentally retarded", they have some notion of the village idiot. They'll think, "He's lucky if he can help Uncle Andrew pump gas over at the Exxon. That's about where that guy will go." These are tough stereotypes to beat. We're selling a product that's very hard to package and very hard to sell. That's a kind of corporate language. I don't mean to denigrate the field by packaging it as some profitable, organizational format. What I'm trying to say is that we've got tough sledding. We shouldn't kid ourselves that when we stand out on the street corner, either as Council chairperson or as a lonely individual citizen-advocate and holler, "Hey! We got a whole bunch of people in this country who are Developmentally Disabled", that they're all going to come running, no sir! They'll go right by you to more glamorous things in town.

Disabled Advocates

So we've got an extra special task that takes extra special people to try and to do. And I call those people disabled advocates. That's us, all of us, or we wouldn't be here. We're all somebody special. We were all chosen for one reason or another by our own colleagues, back in our own home towns. We bubbled up to that point somehow, because we demonstrated an interest or we were politically facile or we didn't know what the hell the Council was, or "Gee, wouldn't it be fun to have four meetings a year that somebody else would pay for." I don't know which. But, somehow, all of us found our way into this, and it's a grand and glorious movement, Developmental Disabilities, it's the only game in town. That's my response to "Oh, to hell with CP, we're gonna keep them MR's up." There isn't any MR, CP or PDQ anymore. We're in an ecumenical movement. It's best. Economically, philosophically, morally, logically, any way you want to cut it. My answer is "You know, we can talk about

MR or CP or epilepsy, or autism, or dyslexia, or specialized programs, that's great, and I believe that we ought to be clear about the similarities and differences, but DD is the only game in town. And that's where we're going to get some action for people who are different.

We have to be special people, and often this is difficult. All of us, no matter what our profession, or our self-image, or where we come from, or where we want to go, should know that the product we are trying to sell will not automatically be scooped up. We are starting from below scratch. That means that we have to make an extra effort in how we move, how we perform, how we act, who we are, how we communicate. We have to do it carefully, and do it in a business-like fashion. We have to do it in such a way that we can withstand the competition of other groups who are trying to do similar things for other kinds of special interests.

We're in the big game. There's a major difference in our business now from twenty years ago. We have lurched from a tambourine-passing, tub-thumping group of pitiful souls, into the mainstream of competition on Health and Social and Moral and Legal issues. We're in the big ball park. And, the competencies we have must be equal to and better than the competencies of other people in the same big ball park with other big issues. We've gotten into the mainstream; we need to act that way, and be able to perform that way in order to be successful.

Sure, there are problems; we are all frustrated by the bureaucracy, our own physical fatigue, or that we can't get that recalcitrant Council member to come around so we can get that program through. But, keeping it moving is important. The enthusiasm that has to go with it is equally important. It's hard to stay up in this game. It's hard to stay enthusiastic. And all of you, if you'll search your heads occasionally will say to yourselves, "Why am I in this game?" It would be so much easier to do something else. Why do we keep jumping back into the fray? Because it's important to do, and we instinctively know it's right.

In order to be an effective disability advocate, I think we have to be mindful of many things. Some of them are rational, logical, competency-building activities, like these conferences - learning how to do things better, learning how to do new things, how to go about it in a different way - always with the same goal: to get something done, to affect peoples' heads, to get them to change their attitudes, as well as their vote, and to get them to change their direction or to initiate a direction. Most people are flat bottomed boats, they don't move anywhere, and they slide easily in any direction, depending on which direction the wind is coming from. You've got to give them some keel, some stability, some direction, some meaning. We can do that, but only if we are personal examples and models of advocacy. Now that sounds corny in this day and age. The corporate state, the group, the mass thing, is in. But, individualism is the heart of advocacy solo flights. You can't pick up advocacy, put it on and wear it around, it will smother you. You've got to feel it; it's got to be something you really mean. It has to be something that you really believe.

If it isn't, get out! We don't need false advocates. They get in our way, they're troublesome. We need people who are in the business because they

want to be, not because they feel they should or because they're satisfying somebody else's needs. Be honest with yourself.

Now, I have developed a kind of code for the disabled advocates. It's conveyed to you somewhat in jest but not entirely. The points I try to make I really mean sincerely and seriously, even though they come packaged in a little bit of levity. Before I do that, let me read you a passage that exemplifies the old way of doing business. Judge Bazalon shared this with me, he picked it up out of a little book published in 1937. It's an article by a teacher entitled "I Taught Them All." You'll all think of a teacher when I read this, someone from your own life. This teacher wrote:

> I taught them all (she's talking about her kids that she worked with many years ago in public school). I taught in high school for many years. During that time I have been assigned, among others, a murderer, an evangelist, a pugelist, a thief, and an imbecile. The murderer was a quiet boy who sat in the first seat, and regarded me with pale blue eyes; the evangelist, easily the most popular boy in the school, had to leave in the junior class; the pugelist sat by the window making noises that frightened even the geraniums; the thief was a gay-hearted Lothario with a song on his lips; and the imbecile was a soft eyed little animal, seeking the shadows.
>
> The murderer now awaits death in the state penitentiary; the evangelist has lain for a year now in the village church yard; the pugelist walks with other thugs in Hong Kong; the thief, by standing on tiptoe, can see the windows of my room from the county jail; and the once gentle-eyed moron beats his head against the padded walls of our state asylum.
>
> All of these people once sat in my room; they sat and looked at me gravely across worn, brown desks. I must have been a great help to these pupils, I taught them the rhyming scheme of an Elizabethan sonnet, and how to diagram a complex sentence.

That is total frustration. She was a sentitive person who saw people aging, and growing and developing who were different, and felt a need to be involved, to be successful and helpful. Nothing happened. She saw the outcome, and felt sheer, total frustration. What did she have to offer? Completely inappropriate types of approaches and skills. That's depressing. That catches you right in the throat. That is not the kind of thing that we must endure anymore. This is an impotence that is no longer necessary. We have the competence, we have the ability, we have the arrangements to do something positive about people who are different. If we don't marshall those skills in ourselves and in our community, then we are guilty of the largest moral indiscretion of this century. We've got an obligation we can't avoid, even though it's very hard to look it in the face. We don't anymore have to tolerate this frustration or this depression. We can do something about it if we will be firm, take risks, address ourselves directly to the tasks, and use our competence.

The Club

We can form a club, and all of you are members of the club. Call it SODA - the Sacred Order of Disability Advocates. Then of course any club, any order must have all the trappings of clubs or orders. I'll introduce you to what I think are its tasks.

A motto - Any good club has to have a motto. Well, the motto that I propose is the motto that any good lover would have, namely "Passion with Competence." What does that mean? It means that we need to care, to love, to be concerned, to be sensitive, to take intellectual and physical risks; but we've got to be competent. It's no longer possible to look a county commissioner in the eye and say "You've got to help these poor people," and the county commissioner asks back, "What will it cost per head?" We've got to know what we're talking about. If we advocate something, we've got to have a basis for it. If you want to see a politician's eyes glaze over, talk about a five year plan. Also you know why his eyes are glazing over? He has a two year term. He doesn't care what's going on five years down the road. Don't go in with a five-year plan. Think about that. Passion with Competence. Enthusiasm, loving, it's okay to say that word - loving - it scares some people. Caring, but with competence. You've got to know what in the hell you're up to. Who are these people? Where are they? What is successful? What isn't successful? The worse thing you can do is sell something that won't work.

Passion with Competence. That's our motto. You can't have one without the other.

What's our symbol? We've got to have a symbol. Tell it with a smile, but mean it. Don't pass the tambourine; don't be a sufferer. "Please sir, may I have what's coming to me? Can we please have what's been put in reserve for these people but they're not getting?" The hell with that. But, on the other hand, you can't go up and say, "Look, you son-of-a-bitch, you're not doing your job." That won't get you anywhere; that'll turn 'em off. So, a smile superimposed on a thunderbolt - that's our symbol. Okay, what's our uniform? Of course, we need a uniform. I suggest the Break-away Jersey so we can't get caught with our data down. And when we want to get the hell out of town, those break-aways are really useful then. Our club flower is the Venus Flytrap. That's the one which get's 'em in, soaks 'em up, swallows hard, but looks pretty. Finally, here is our club cheer. Watch carefully; this is our club cheer. Clap your hands and stamp your feet, we're number one.

Don't Bees

Now there are some do bees and some don't bees. (I got these out of a parent's magazine.) Here are some styles that you should not be if you want to be a good advocate. After this, I'll tell you some things that you ought to be. There are five styles that especially bug us, and you'll probably think of some people like this - chairpersons, Council members, consumer representatives. etc.

The first style I call the Karem Abdul Jabar style. What is that? You take the ball and - zoom - you run the length of the court, all alone, stuff it in the basket, and the crown roars. The only problem is that your team

was left behind. No plan, no passes, no sharing, no support if you miss. Don't fly solo. Program planning insures team-work.

The second style is Duncan Hines. You all know Duncan Hines: sample a little bit of this, a little bit of that, some of these and some of those. If the governor's assistant comes to you and says there are an extra two million bucks that could be put into DD, don't say "Oh we've got to have 12 of these and 16 of those. . . ." Listen, unless we have that whole package with that whole recipe, we can't do business. You go back and tell the governor that you're sorry but he can keep that two million. . . ." Know your priorities and start at the top of your list. Decide which are the most important things that you need to have and go with them. Don't insist on the whole package, don't be Duncan Hines - you have to have the whole meal or nothing. It's a quick way to starve to death. It's a style that the Council cannot afford to have.

Sheldon Cerebrotonic represents the third style. One style that just doesn't help is the "four dollar word " person. The cerebral approach to everything. Quoting the research data, bringing in tons of back-up data. It's important to have data, but you've got to present it in a simple, effective way. If you make an intellectual exercise out of everything, you can forget it. You'll turn off people very quickly. Oh, Sheldon Cerebrotonic could be an effective member of the Council, but you ought to keep Sheldon in the back room grinding out the data, and pass it along to your information guys, and say, "Sheldon, that's a terrific idea." But, don't let him walk into your Council, school board or county commissioners' meetings. There he is, in a crisis meeting, to determine what should be cut from the budget; they've got ten minutes to give you (because there are 94 other people that have to go before the school board), and Sheldon has an hour and a half presentation with 12 wheelbarrows full of transparencies, slides and data. You want to see glassy eyes in school board members? Arrive with a whole pouch full of transparencies and little goodies for a presentation in a room with no air-conditioning. Keep Sheldon down. Sheldon's important; there's a role for everybody, but don't put Sheldon up front, especially with hassled decision makers, school board members, county commissioners, Governor's advisers and councils, state agencies. Let him be a Guru.

There is a very destructive style. All of us need to be aware of it. It is Ms. Double Identity: persons who say one thing in a Council meeting and another thing to their friends, in an isolated situation. "Yeah, or I voted for it but, 'the Devil made me do it.'" People who don't want to help people, politicians, bureaucrats, other consumers, people who have different motives than you, will take every opportunity to allow themselves to act confused by getting you to back away from a group decision. You may not be totally sold. You may even have voted against a priority or a method of doing business in the Council meeting, but if you walk out of that room after that Council has decided what the consensus is, then that is what it has to be, and, that's what you have to do. You might win the next one. Don't go out in the hall and say "Oh, those horses tails. . . ." You're part of that group, you've got to affiliate with them. You can not be a double agent. You will be a huge chink in the armor of the Council, and you will soon be found, by the other forces.

The last style is a Senator Claghorn. Watch out for old Senator Claghorn. Since the mid to late fifties, large numbers of people have built large political fortunes on the handicapped constituency, most of them legitimate and in a helpful fashion. It's increasingly apparent to bright young political aspirants that this is a large constituency and that there are a large number of votes there. Maybe, or maybe not, you'll get some action after that person is elected. Beware of the sudden total commitment of a shiny new politician. In your interest in infiltrating the political, and legislative and governmental structure, to get advocates on the inside of the system, be careful you don't get snagged too quickly. This can be a crafty person. They are in the minority, but there are some pretty sharp characters who will shake your hand, gobble you up, and drop you like a hot potato a day after the election. Watch out for Senator Claghorns. They are great speakers (they usually want you to write the speeches), but they deliver them with eloquence (lots of qualifying adverbs): "If I get in I might be able to consider the possibility of sitting down to think through the opportunities before you people." Be careful of the Senator.

Do Bees

Persistence. Okay, now there's a difference between persistence and perseveration. I know some people who tell me the same thing, and they've told it for ten years "How would you do it? . . . blah, blah, blah," the answer to every question is the same - the same model, the same consultant, the same book, the same strategy. They're hung up. That's perseveration. Persistence includes flexibility. Shift and change and repackage, always with the objective of better services and for positive and productive change. Don't always use the same plan, the same words, the same faces, the same targets. Keep moving. It's like guerrilla warfare. Be persistent. Don't be daunted if you run into a wall here or a hole there. Go around or jump over. But be persistent.

Firmness. First, be sure that you are on firm ground and then stick with it. Don't be rigid, but be firm. If your convictions begin to erode, say to yourself, "Maybe my data are not quite right." Go back to the data source, be sure and then return. One of the things that you will get back right in your face is the familiar phrase and a cross look. "Don't you know that we don't have room in our budget this year?" Well, that's a standard response. You should look back and say, "Well, I was hoping you would make room." Keep pushing, be firm, don't back away easily. Don't be obnoxious, smile.

Be Rewarding. Occasionally put in your newsletter that the Governor did something good. You might even have a press conference when he signs a general health bill. It may not relate directly to DD, but indirectly the new bill is going to be beneficial. In the early days of the development of our DD project, we invited an ex-governor to talk with us about many things. He said, "You know, let me share something with you. The only time I heard from those consumers is when they wanted something, or when they were as mad as hell, because I didn't do something. They never told me after I did something good that it was good, they never rewarded me." Develop a positive reinforcement schedule for people whose behavior you want to affect. It's very important. It's fun too. It'll make you feel good. To have a caucus around a pleasant issue is oftentimes a relief. And, it can lead to very positive

behaviors on the part of others.

Finally, enthusiasm. You can't get anywhere unless you're enthusiastic about what you do, even if you're dying inside. "This is an important program." "This is an important thing to get done." "These people need you and you can be very helpful to them, sir." Enthusiasm! It will be contagious. People will say, "Wow, he's excited about that, maybe there's something in that." You've got to communicate that.

So out of the thunder bolt - firmness, simplicity, directness, perspective, persistence, enthusiasm.

Basic Principles for Advocates to Follow

There are some basic principles in this business. I'll give you a few.

The Tarzan principle - never let go of a vine, unless you have a firm grip on another one. Don't go into your Council and say, "Let's sack everything, and start from scratch." Get into that new stuff before you let go of the old stuff. The Tarzan principle. Swing from vine to vine, smoothly. If people are left with ambiguity, they'll drop out. You'll have a flat bottomed boat and you'll be drifting around as far as your Council is concerned.

The sting. You all know the sting. This can work very effectively. Have the Council invite the heads of the agencies, one at a time to the Council meetings, and say "What can we do for you?" Don't get them on the pad and say, "Look you dummy, you've got back wards that are lousy. . . ." Catch these people off guard by asking them in. They'll come in with an arm load of reasons why they haven't been able to do things. Don't ask them that. Say, "We're interested in the alcoholism treatment program that you're pushing. How can we go about helping you do your thing?" "Can we show up for hearings on the budget for your drug abuse program?" You'll get looks of astonishment. In the process you will steadily gather a pile of blue chips. Then when you've got some chips to spend you give a call to your friends. You say, "They're gonna pull the budget on the Developmental Disabilities up in the mountains." How about helping out? Remember last spring at the hearing. . . ." That's the sting. It's a good principle to follow. Start storing away blue chips now. It's important to do that. If you don't have any chips, you're going to be in deep trouble.

The third principle is called the pair of deuces principle. One thing you've got to know and realize is that the DD movement, given the amount of money we have, the competition we have, and the clout we have, relatively speaking, is not a "full house." We have a pair of deuces. But, breast your cards girls. Don't let anybody know you've got a pair of deuces; act like you've got a full house or a royal flush. Say, "We all got together (now don't say that 'we' is two people over coffee) and it's unanimous. . . ." Occasionally you're going to have to do it. If at the time you don't have it all, if you act like you do, you have just as much clout. Now you run the risk of outrunning your data or not being able to follow through. But we've got to be as crafty as the other guy. Use it selectively. But use it.

The Lombardi principle. The late great Vince Lombardi had a simple principle which is characterized in his book called Run For Daylight. That's good Council behavior. If your number one priority is the development of early education programs, and your number two priority is a statewide screening program, and your number three priority is the training and upgrading of staff in institutions, and suddenly a bill is introduced into the legislature that would make possible the development of new screening clinics in conjunction with the comprehensive community mental health system, "run for that daylight!" Don't discard it or reject it because it isn't on your list. That's regidity. You never know when things are coming up. Run for daylight! Get your group together and say, "Here's a new thrust in a related area. I know it's priority number seven for us now, but there's a piece of daylight here." Now's the time to go for that . . . Don't be afraid to make those moves. It's awfully nice and comforting and appealing to go home from the meeting and say, "There, at last, we've got priorities, we know exactly what we are going to do, we've got our flow charts, our measurable objectives, and we're locked in. Holy Smokes, aren't we great!" Don't feel like that's a bible that can not be modified by different strategies.

The KYB principle - Know Your Business. You can't wing it in DD. If you don't know the differences between cerebral palsy and dyslexia, you'd better drop out of sight for awhile and figure out what it is. You're going to get hit right in the teeth if you don't know your business. If you don't know the incidence of articulation disorders in the school population, you'd better find out. If you walk up to somebody after this Conference and say, "We learned about force field analysis." That's a wonderful set of labels, but if you don't know what they mean, don't say it, because somebody will say, "What's that mean?" and you'll be out of luck.

Finale

Okay, so much for the club, the mottoes, the symbols, the Do bees and the principles. The point is there are some effective and some not so effective behaviors at our disposal. We need passion and competence. We need to develop competencies and deliver them with enthusiasm. You are now aware that we are in the minority, that we need to be pushier than the rest. That we have a great mission and a worthy goal.

Nobody has characterized our situation better, in my judgement, than Frank Porter Graham. He's the person after whom our Center was named. I've had a little hobby in the last few years of collecting his speeches. One of his presentations, way back in 1937, in a talk in Washington to the Congress, really caught my eye. It characterized the DD movement. I'd like to read it to you.

Mr. Graham was a diminutive fellow. He wasn't very tall, but he had quick hands and a quick mind. A great person, an intellectual, a person who would be very proud of what we are doing. Unfortunately he passed away two years ago at the incredible age of 91. A full, productive life - everybody envied that. In 1937, one of Frank Porter Graham's great presentations before a Treasury committee in Washington can be paraphrased to fit our situation. Even at that time he was talking about the great need to combine welfare and health services. He said, "The need is so great that it is like a great ocean.

There's room for private physicians and public helpers, welfare workers and volunteer associations in the public and private sector."

In the course of that presentation he also summed up a real life story, which you can find in his biography as well, and he used it in that presentation to make a point, that I'd also like to make today - he said to these learned men on the Treasury committee:

> Three summers ago I was on a little sand bar off the coast of North Carolina, a little sandbar about half a mile wide, between a big ocean and a great sound. On this particular night, the most terrific hurricane that ever hit our south Atlantic shore surged across that little sand bar. Towards midnight it broke in the door of the little cottage where my grandfather stayed. Toward morning, during the lull in the hurricane, we moved to a cottage on higher ground. As I came up on the back porch I saw our cook cooking breakfast as if there might be some use for such a thing in this threatening world. In order to reassure myself, I attempted to reassure her. I said, you know as I looked out the kitchen window and saw the water pushing by, it seemed to me that the water outside your kitchen window was going down just a little. And, she said, in her wisdom, 'Mr. Graham, it ain't the water outside my window that's bothering me, it's those three thousand miles of water out there that's leaning up against those little waters.'

And I say now, it's those great waters out there pressing up against this little conference. An ocean of people in need, in a sea of public apathy. You can do something about it, believe that. Passion with competence. Steady pressure and above all - enthusiasm.

KNOW YOUR BUSINESS: AN INTRODUCTION TO ORIENTATION*

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*This is a transcript of Dr. Stedman's Conference presentation.

This opening session is calculated to put us into the framework of why we are here for this Conference. Basically, the objective is to learn how to orient Council members and to focus on what orientation-training is and what value it has. We will concentrate on the orientation process as well as consider whatever content you might want to deliver through the various training techniques. Eventually, we hope everybody will leave this Conference with a plan for training, with some determination to develop and deliver it with their own resources, and with competencies and skills that have either been revitalized or developed.

A Need To Know

A prior condition that's absolutely necessary for effective orientation-training planning, regardless of the size of your staff, or the motivation and composition of your Council, is knowledge about what that Council is supposed to be. Some basic thinking with regard to the problem and alternative directions is absolutely necessary. Without a basic understanding and knowledge of what DD is, what the Council is, and what are some alternative ways of operating, the Council simply cannot function. There are other things such as leadership that are certainly necessary; but what I hope to impress on you in this first session is that the fundamental rationale for continuing orientation and training of Council members is to maintain a level of knowledge and understanding that will allow the members to function and participate in an effective way, no matter what the Council's direction.

You can't develop or accomplish anything, except perhaps a couple of successful cocktail parties or press conferences, unless you have a well-informed Council. Now that will cause chairpersons and staff directors some difficulties because obviously, the more knowledge there is among the Council membership, then the more alternative points of view that will be generated. But that is fine. You can not generate a set of creative and viable priorities unless you have input from everybody, and that input can only come from a basic common knowledge. So to start with, I believe that there are several things that you want to do. One is to develop some key notions within the Council, such as an understanding that all of the activities in which the DD Council gets involved lead to some type of action. The Council must have the capacity to act as well as to remember that although it does not always actively initiate, the members still need basic understanding and information in order to effectively react. Councils need to have basic knowledge to decide whether or not, for example, to lend support to individuals or organizations, public or private, and in order to make that kind of decision, you have to be fully acquainted with the alternatives. In last night's video tape presentation, we heard Stan Thomas, from the U.S. Office of Human Development, talk about the importance of developing alternative strategies for action. When you come out of the huddle and go up to the line, you have several alternatives in your mind, not just one. It depends on what you see when you look over on the other side. That's a Nixon-ism. Creativity is a necessary element of an effective Council and to be creative, to develop imaginative strategies and plans, you must have knowledge and understanding.

How can a Council be effective in any dimension unless its members are

aware of what is happening? You must have information. Basic knowledge is an absolute necessity that can only be provided by a continuing in-service training, staff development, or Council orientation. Your troops must be informed, and not only that, they have to be informed in an imaginative way. Use a variety of techniques, including small group procedures, individual presentations, and mediated materials.

A Definition of Orientation and Need For It

All of this amounts to a very simple definition of orientation which is the provision of knowledge to people in need of it. That helps you decide what knowledge is transferred from whom to whom by whom. As staff director, chairperson, the head of the training-orientation committee or some task group of the Council - you must make some decisions about what knowledge is important. You must be willing to take some risks. You are not always going to be able to put your finger on exactly what ought to be transferred at every moment in time, but there are some basics: the definition of developmental disability, who's in, who's out, why, what it means; what legal or legislative activities are currently occuring in the state; as well as knowledge of a host of content areas. It all boils down to the provision of knowledge to people in need of it.

Let me discuss somewhat further the value of this type of continuing orientation. First of all, there are new Council members who probably have a lot to give, who are bright, energetic, effective in their own sphere, but who need to be brought on board with regard to the role and function of the Council, as well as to what the issues are in the state. These people require some basic data with regard to current needs and more importantly, perhaps, the history of what has gone on in that state prior to the time of their joining the Council. How often have you heard, not only as a new member of the Council but as a new member of any organization, "Oh, we tried that before and it didn't work." Of course, that's the last time you'll make a suggestion to that crowd, because you took a risk, and said, "Why don't we hang Ardvark, so Ardvark won't be around and therefore we won't have any barriers to that particular objective." Well, you got shouted down, but you simply were unaware of the history of the situation. And consequently you shut down on continued input into the Council's activities. Orientation can provide some perspective, some backdrop, some historical data to bring members on board so they will have some idea of what's transpired to this point in time, so that they then might be able to put their own ideas and their own activities into an historical perspective that will make them more effective.

I have talked to a number of Council members around the country, asking what are the priorities in their state. After they enumerate, I then ask how these priorities are different from those of two years ago. They often reply that they don't know; they never saw the plan from two years ago. I think this is a deficit. No matter what the level and the quality of the plan was, it is important for Council members to know what has transpired, and what were the origins of the thinking. Orientation training certainly can include some historical data and thus put some necessary perspective into the situation for new members.

There is another type of perspective to be considered: organizational perspective. I once asked a Council member in a New England state, "What is the administering agency to which your Council is attached organizationally?" "Oh, we're attached to the Governor's Office." I said, "You are? That's strange, I didnt' realize that." Well, it turns out that they were not attached to the Governor's Office at all; they were attached to the Division of Mental Health which was an agency in the state government. What a terrible information gap for a Council member to have the understanding that, organizationally, the Council was in the Governor's Office when in fact it was attached to a specific administering agency within the organization of state government.

It is important for Council members to know where the Council fits organizationally; that is a part of orientation and training. What is the Council's current understanding of how many handicapped persons there are in the state? What is the difference between dyslexia and learning disabilities? If a Council member is expected to go out and attend a fund-raising in order to encourage politicians to lean in our direction, then they also have to be fully prepared to explain to someone who either knows or who does not know, the difference between labels. If they are not able to explain these differences, they may be soured, and avoid those situations in which their knowledge might be tested again. Council members need to be informed, with regard to the specific content of our business. It is important to have this knowledge in order to feel secure. How uncomfortable it is to be in a situation when you do not know exactly why you are there, or, in many cases, even how you got there. I once asked someone, "How did you get to be a Council member?" "I'll be damned if I know," he said, "I got this letter and it came from the Governor's Office and it sounded important. I didn't know what a developmental discomboberation was at all, but I thought I'd go to those meetings; they were all in the state capitol; it sounded like a good thing to do. After all, I feel I have to serve my state when called upon." Great, but without data or even an adequate knowledge of the problem this person was miles away from being an effective Council member.

Every chairperson should constantly agitate diplomatically for the membership to contribute solutions and solution statements in the course of a Council's activities. Not problems - statements such as, "How come we can't do this? Why don't we stop doing that?" These should be talked about, but they will not be very constructive. Instead, expect and encourage solution statements, such as: "You know, it's possible that if we linked our well-baby clinic system to early childhood education that we could have a health and education service program in these four communities." That is a creative idea. Although presently, it may not be possible for economic or other reasons, this is the kind of statement to reinforce. It is a creative, imaginative statement, directed toward service program development. The person is saying, "This seems to be a better way of doing this." Those kinds of statements, however, cannot be forthcoming without some kind of knowledge of the situation.

Build that basic knowledge core for a Council, so that they feel a part of things, are aware of the historical perspective, and understand their task as best as we can decide upon it, although, granted, it's never

100% clear. Armed with knowledge they can then move with you and the other Council members toward creative, imaginative, solution-type statements based on a feeling of security, understanding and the willingness to take intellectual risks backed by a thorough knowledge of the problem, the organization, Council and its role and function. It boils down basically to what I call the KYB principle: Know Your Business. If you do not want to take the time to know your business, then please leave. Because you can get us all in terrible trouble if you do not know what you are talking about. Now, I do not want to freeze you in position by having you say to yourselves, "Gee, I don't know all there is to know about this so maybe I'd better not sit here, maybe I'd better leave." But this is a serious matter. We are in a big ballgame competing with other major issues for economic resources, as well as for psychological support from the community and the society. Unless we know our business, we can get into deep trouble.

Let me give you a little anecdote that illustrates the point about the KYB principle. It has been said that a young fellow returning from Viet Nam, who was going to get the G. I. Bill in order to help reestablish himself in society, decided that he was not going to go back to downtown Philadelphia. He had had enough of urban life, and this was his chance to satisfy a dream and a fantasy that he had had for many years. His dream was to go out into the rural areas of Pennsylvania - and to get into the farming business. That sounded exciting; it was something he wanted to do. He decided he was going to come back to Pennsylvania and use his G. I. Bill to buy a small farm in Western Pennsylvania and go into the pig-raising business. He said, "That sounds simple; it can't be too difficult. I don't know too much about it, but I'm sure I can get the technical assistance I need from the University of North Carolina to go into the pig-raising business in Pennsylvania." So he did. Now he did not have a great deal of money, so all he could afford was one sow. He did not know much about it, but he knew, instinctively, that in order to get on with the pig-raising business, he needed more than one pig, and that he probably needed some service for that sow. So he got up bright and early one morning after looking at his technical assistance catalogue as to where the closest service might be, went out behind the house to the pig sty, put the sow in the wheelbarrow and trundled her twenty miles out to the service station, paid $25, which was almost all he had left, got the service for the sow, brought the sow back, put her in the pig sty and thought, "Now we're under way." Next morning he woke up, dashed downstairs and out in the backyard to the pig sty, lifted up the sow and there were no piglets. He was really upset. He spent $25 and went to all of that trouble. "Well", he said, "I committed myself, I can't stop at this point." Knowing there was another service center a little farther away, he put the sow in the wheelbarrow, trundled her 28 miles to the second service station, paid $51, brought the sow back and put her in the pig sty. The next morning he got up and raced downstairs into the pig sty, and, once again, found no piglets. "What the . . .?" He was really upset. He then said to his wife, "You know, honey, we've just got to keep going until something happens because we've got too much invested in the farm, the pig sty and the sow. We'll try it one more time; and we're going into the automobile business if that doesn't work." So he put the sow in the wheelbarrow and pushed her 55 miles, up and back. This time it cost him $100. He put the sow in the pig sty and went to bed. The next morning he got up, but he just couldn't bring himself to go down

and look, so he jabbed his wife in the ribs and said, "Honey, go out and look and see if we got any action." Downstairs she went, and after about five minutes, he could no longer contain himself, so he got out of bed, flew down the stairs, raced toward the back of the house, met his wife coming back in through the kitchen, and said, "Honey, any piglets? Any piglets?" She said, "No, but the sow's in the wheelbarrow waiting for you."

Several things transpired there. First, the sow got the message; she got behavior modification. Certainly things happened, but as far as the understanding as to what the hell was going on, that young fellow obviously did not have the basic knowledge and understanding. I will not belabor the point, but the KYB principle insists that you know your business.

Planning For Orientation

One of the important things to keep in mind in the development of an orientation training activity is that it should be as carefully planned as any other activity in which the Council becomes involved. You have probably already been beseiged by a large number and variety of alternative planning methods. I am not advocating one type of planning approach over another; almost all planning systems have the same basic elements. You start by identifying the needs of people or of the organization and then you identify the resources that you already have.

As well as being aware of the resources that you have and those that will be necessary if you are to effectively implement the strategies or the actions that you devise, you must also be aware of your minuses. What are the constraints in terms of money, people and imagination? One major constraint of Council activity is definitely an inadequate level of understanding and knowledge. If your need is to develop a workshop on alternative methods of staffing group homes and your Council does not understand what a group home is, you must consider this a constraint, because you are not going to get anywhere using your Council to talk about a group home unless they know what a group home is. This may require that you go out and visit one, or that somebody stay overnight in one, in order to really get an adequate understanding of what a group home is all about.

Basically the steps in the planning of an orientation Conference are: to identify the training needs; to tally available resources to help meet those needs; to decide who can deliver the training; to discover the space at your disposal; to determine a budget; to determine the constraints; to decide when it should be held and who can not be there at that time; and then to determine what actions you are going to undertake in order to deliver a first rate orientation training activity. You must develop a method for satisfying the needs identified and you must be aware of it before you take your first step. You must have a way to find out whether the Conference was effective in satisfying the needs you identified. We have all attended dozens of beautifully conducted Conferences, which started out to satisfy an information gap such as the content in a new set of regulations. Unfortunately the Conference does everything but address itself to what exactly those regulations are. You go home with a nice warm feeling; you meet some new people; there were some nice socials, and you have acquired

many materials you can show your wife and your boss, but you still do not know what the regulations are. That need has not been met.

If you know your business, you can set up the basic steps and insure a pre-arranged evaluation activity to test whether or not you have been successful. The evaluation is for your purposes, so that you can compare the results, whether they are from an informal or formal evaluation of your Conference, with your needs. Then you will know that you no longer have a particular need or that you have only met about one-half of that need. Evaluation is a very important element, and in 90% of all Conferences that element is omitted. Most of the time you go home with a warm feeling, but with no data, and no understanding. We are not in the business of creating warm feelings, and we should not be squandering money on happy times. It is okay to have fun in the going, but you should be task-oriented, and the only way to find out to what degree you are task-oriented is to have a pre-planned evaluation activity. The evaluation activity will let you know whether or not you in fact oriented anybody or just satisfied that little box on your pert chart that said-on December 7, we are going to have a training Conference-so on December 8, you can put a check in that box and feel good.

All of us have guilt feelings because of participating in such Conferences, but we are not going to do that any more. To be effective, then, there must be clear identification of the training needs and a good, thoughtful look at the resources. The resources should be imaginative, not simply a series of standup lectures, or passing out print materials. Enumerate the constraints and then decide on the actions necessary in order to achieve a first-rate orientation which can be evaluated and which relates to the need statements.

The Big Seven

We are discussing a planning system, a way of systematically getting at what it is you want to do. What should you ask yourself at the outset in regard to the content elements of a training activity? Be sure to ask all of "The Big Seven." Basically all those charts boil down to seven crucial questions. You can keep a check list in your shirt pocket or your purse to be sure that as you progress in the planning and the implementation of a training Conference, you include all seven questions. Be clear at the outset who your customer is, and do not just invite the whole town, because then you will have a lot of customers who are coming from very different places in terms of their understanding of why they are there. Do a thorough, thoughtful review in your own head, and in a small discussion group with your Council, as to exactly who the customer is.

One very important activity that is not going on often enough around the country is for DD Councils to develop a systematic briefing for the hierarchies of consumer groups concerning what they are doing and what they are planning to do. There are certain risks, particularly if there is some alienation of affection between these groups, but I think the Council has the responsibility to keep everybody informed, whether or not the groups are actually supportive. Often times it is important for Councils to identify who, other than Council members, needs continuing input with regard to

Council actions. How are you going to deliver the information? Is it going to be a one-day meeting? Is it going to be a standup lecture? Are you going to get Professor Brains from the nearby University to come and bore everybody to death, or are you going to find some really interesting way to present that information? Why are you doing it? Is it just for fun, or is it something you feel that you ought to do, or is there rationale for developing an improved level of understanding and knowledge in the heads of certain people?

And when are you going to do it? People are peddling miles, selling insurance, or practicing law, and they can not always give up a day's pay. You know that; I am telling you something you already know. But, the "when" is critical, because you need to have the mule's attention if you want him to learn something new. And, so, you often find yourself having to meet on Friday evenings, or on Saturdays, and people grouch; they would rather be out fishing, mowing the lawn, or watching the football game on Saturday afternoon; therefore, the "when" of it can be very important.

And where? If you have it in downtown Dallas, and a fire sale is being held, you are going to lose most of your members, because they are going to go over and buy fire trucks while you are trying to give them information. The "where" of it is very important. Choose a place that is not too relaxed, but relaxed enough so that you can let people focus their attention on the process and the content of what you are trying to convey. Do not forget the evaluation aspect. Be sure and ask yourself, "What happened?"

So, the Big Seven are What, Who, Where, How, Why, When and What Happened? If you are a chairperson or a planner and you have a task group assigned to prepare a plan for a training Conference, when that plan is brought to you, look at it with the checklist in your left hand, and if those seven things are not answered by that proposal or that plan, then say, for example, "Well, we really need to look a little bit closer at why we are doing this."

One thing that we often do not think enough about when we get into the orientation-training business is that the tempo of it, the content of it, and the way that the knowledge is delivered must be shaped or packaged, and timed. This should all be thought of as a function of the "who" part of it. Who are the customers? Who are the targets of the training activity? There are at least four categories of people. When you are thinking about the "who" and about the "how" of delivering content, think about it with the type of target group that you have in mind. The four target categories include the doers, the helpers, the shapers and the stoppers. We must recognize four kinds of folks in terms of our attempts to be good and effective Council members. When we get to training, or delivering information, no matter how intensively or extensively, the training will be shaped as a function of the kind of target that we are trying to reach.

The doers are the people we want to move to action, because they are directly involved in the action, themselves. We want certain agency personnel to do certain things; we want certain program personnel to understand or to do certain things. Those are the action people-the doers. The

transference of information or orientation to the doers is extremely important. They need to know not only how but why, because then if they have to make decisions in the course of their doing, they will have some understanding of what they are about, and they can be more effective and can modify their own behaviors as they proceed. The doers are exceedingly important people.

Helpers are people who do not have direct action behaviors, but who should be reached, and need to be reached. They are the helpers, the people who back up the doers. They may be the advisory board or the advisory commission of the State Department of Mental Health. These are the policy-makers, the decision-makers. They are much like shapers, but I will explain the difference shortly. The helpers are people whose heads you want to reach with your data, your point of view, your plans, your actions, your history, so that they will be in a position to help the doers or to help you when called upon. They need to be in the know, and therefore, information needs to be provided for them.

Shapers are people who mold public opinion, or points of view. An example of a training activity for this kind of target group could be to develop a special Conference once a year for the editors of the newspapers in your state, to inform them about such things as the problems of developmentally disabled people, the functions of the Council, the plans for the upcoming year, and the issues that are likely to arise. This briefing is very important, because these people shape public opinion. Everyone of you knows that one bad paragraph in one well-read editorial can be fatal. And it may not have been intended to be malevolent at all; perhaps it was intended to be helpful. How many times has an editor or a newspaper reporter said, "Gee, you know I thought I was doing you guys a favor, I gave you some front page space." And you say, "Yeah, but you spelled our name wrong." Hopefully it is not that trivial a problem, but the shapers - people who mold and influence public opinion - are important targets, because in turn, their knowledge is translated into legislative action.

Finally, there are the stoppers. These are people who make a business out of stopping other people from doing things. They do not do much on their own; they just go around stopping others. They are, I suppose, the developmental disability counter-part of Johnny Bench; they are always in there catching and becoming barriers, but never coming up with their own ideas. One very large chunk of the stopper population is people who are initially neutral on an issue, but because they were not advised, or felt that they were not advised, oftentimes say, "Well, you didn't consult with me." They are self-appointed people; I'm certain you can think of some in your own life space. If at all possible, avoid mobilizing a neutral group against you by simply not keeping them informed. An example of this in one state occurred when the state bar association was maligned in the newspapers for not helping a special interest group address the issue of zoning laws so the group could proceed with the development of group homes. That bar association did not have the foggiest notion that the DD Council even existed. Suddenly, it appears that the DD Council called them S-O-B's. They then had no choice but to be stoppers. Consider the potential stopper populations when you think about your public education program, your backgrounding, your orienting, and your briefing types of activities. The potential

stoppers will not always listen; they may not always attend closely, because they may not feel like they need to know what it is you are trying to tell them. But, in a case like the one I mentioned, you are not going to get very far with zoning law changes unless you can mobilize the critical discipline in that area to support you, namely the bar association, the lawyers, and others like the county commissioners, the zoning directors, etc. So there are potential stopper populations that you definitely ought to consider.

The point here is to realize that there are at least four categories of potential customers for training, for receiving information from Council or Council-staff activities, and that it is very important that you are aware of the fact that there are alternative targets. Due to the ever present problem of limited resources, I feel it necessary to rank order the customers in terms of importance in being reached. After all, you cannot turn yourself into a fulltime public relations firm, or training organization. Therefore, I would attack the doers primarily, and if I had some additional resources, I would go after the helpers, and if I still had more, I would then pursue the shapers, and finally I would go after the stoppers. Depending on how comprehensive the activity is, these are the categories of targets of importance in terms of the orientation and training business.

Just a brief note about media and materials. I think that everyone has experienced, probably in connection with formal education, the absolute boredom of sitting theatre style, for hours on end, listening to someone drone on, in a sometimes unintelligible voice, about a topic you are sure you really need to know about. Please try to avoid that. There are enormous resources that are oftentimes much more simple to access or to develop than you might think.

I am well aware of the fact that at the crucial moment the slide projector will jam, or the transparency will burn before your eyes, but try to mix, match, and use multiple approaches. Do not play the old army game of deciding how much you are going to tell them, then tell them, then tell them what you told them. Do it in different ways. Use audio tapes and the materials in your Conference kit. There is a great deal to be said about alternative ways of delivering information. It is not that difficult to get more sophisticated, and besides, it is really more fun for people to be able to see what you said and to hear it, as well as to do some of the other things that we will discuss. It is just plain laziness to have a Conference, even if it is only a three-hour Conference, and to rent a room and put some chairs in a row, a podium up front with a glass of water, and say to whomever is going to hold forth, there is your three hours. If you are a participant in that kind of activity, you should protest that those in charge are insulting your intelligence. You have more to do than just to come and listen. You should be allowed to participate, to see some alternative points of view, while you are receiving and integrating this information. As a planner of a Conference, you can help that process through the selection of the content presented by carefully reviewing the steps involved and by looking at the rationale, as well as by using some of the technology that has been developed in order to facilitate a transfer of information.

There is also an unfortunate aspect of technology being used to transfer information. At every conference there are people who come with complete moral detachment; they have brought their Norelco or Sony, and they will put it right next to you and bug you, and I suppose the message that is being transmitted is that "I've come here and I'm so interested in what your're saying that I'm going to capture it and take it home, and I'm going to listen to it, and I'm going to play it for my class." Ninety-percent of those people never listen to the tape again. They tape the presentation and they might take pictures, but they really are not "getting" it. What they are doing, in most cases, is holding it all at a distance. What I would rather they do is just listen and participate and get it into their heads so that they understand it, and it becomes part of them. Then they can go home and really give it to somebody else. Do not come and take it for the Archives, which is where it goes, because none of us go to the Archives, although we might say we do. How many people have rows of tapes and little memos they have never again listened to or read? So, we must consider on a contining basis the critical areas of targets, planning systems, The Big Seven, and media materials.

Evaluation

Now I would like to say something else about evaluation. Let me first tell you what evaluation is not. There are a number of words in our lexicon which are used interchangeably, but which confuse issues. I think it is important for you to point out when you speak to your Councils that you must develop a way to evaluate your program or plan. This is not diagnosis. Diagnosis and evaluation are used almost interchangeably in the clinical world, whether it is health, education, or social work. Diagnosis is a specific analysis of an individual with the intent of some type of treatment. You do not want a diagnosis of your orientation or training plan. Assessment is very similar to diagnosis. It is the gathering of specific data about a person, so that you can formulate an effective prescription, whether the prescription is for health or educational purposes. Assessment does not necessarily lead to a label or catergorization like diagnosis would, but in any case, it is not an evaluation. To assess the situation is not to evaluate it, because you do not end with a statement about the effectiveness of the process leading to previously described objectives. Finally, research is not evaluation. Research is a systematic pursuit of the answer to a previously defined question. Evaluation is <u>not</u> pursuit of a previously described question.

Evaluation is the process of checking the method you have used to achieve an end to see whether or not what you wanted to take place actually happened. There are several ways to go about evaluation. It does not have to be a highly formal procedure, with a standardized instrument and a checklist. You can have formal evaluation, and that is fine, but it is oftentimes difficult to do because you may not have firmly fixed in your mind some way to develop an instrument to evaluate the outcomes. There will always be a few people who will say, "This is kindergarten stuff; I'm not filling out any checklist." Try not to cause any Gaza strip about the whole thing, but instead say that "It would be helpful," that "We are not testing you; it is simply helpful to us to know how well we're doing so we can modify our approach if we are not doing well."

Now let us turn to immediate versus delayed evaluation. Oftentimes the full impact of training activities can only be measured a good bit after the activity has taken place. What you are really shooting for in most cases with training is, not just a change in the vocabulary of the person, or the customers who are involved, but a change in their behavior. One of the most difficult things to measure is a change in attitude, something we really do not even know how to measure. It does not mean that we should not try or that it can not be done, but at this point you are primarily interested in your training activity.

In modifying people's behaviors, you can judge best by delayed evaluation. Six months later you can look to see if the planners and various state agencies are, in fact, using some of the techniques in their everyday practice which were provided through a Conference that you helped support on planning techniques for bureaucrats, in the area of handicapped persons. You can take an actual follow-through look at whether behaviors were, in fact, changed. And these behaviors can best be measured a good bit distant from the Conference, to see if in fact, the long-term behaviors of the people you have attempted to modify have actually changed. That is important; it is called delayed measure. It is also important to remember that complicated and comprehensive training activities sometimes require an integration, or a kind of settling in, of information. People do not always respond immediately. Sometimes you simply cannot, and there have been many studies that have indicated quite clearly that when you try to measure for change right after a Conference, you find either no change, or sometimes you find dramatic change. Then when you return to those same people six months later, they have either gone back to their old ways or they have forgotten what you told them. Perhaps, however, where previously no change might have been noticed, you now notice a change, a delayed effect because a period of synthesizing or integrating has taken place. This can only be captured by a delayed evaluation of your Conference which could be either formal or informal. You could go around in six months and say, "Hey, remember that Conference we had last fall? A number of people felt that that was very useful. I wonder if you felt that it was useful." And if they say, "What Conference?" that tells you something. Or they could say, "You know, I never told you this, but that was a complete bomb. I didn't get anything out of that. I talked to Charlie about three weeks later, and Charlie thinks it was a bomb too." But they think you are such nice people they do not tell you. Since you need to know these things, the delayed aspects of the evaluation are very important.

Direct versus indirect evaluation. You can oftentimes find out better from third parties (such as the bosses of people you are trying to affect) about the effect of your training activity. "You remember last fall when you supported Charlie's going to a Conference on planning or an article written in the area of DD? Do you think that Charlie got any value from that?" "Oh yeah, Charlie has been a changed person, ever since he came back. He just sleeps all day. . . ." Sometimes you do not go directly to the consumer to get evaluation feedback; you can do it in an indirect fashion. Consumer groups are oftentimes good thermometers as to what is happening as a result of Council activities, and you do not always have to wait for them to express their opinion, and they do not always have to be asked.

Conclusion

Basically, the guide here is the KYB principle (Know Your Business), so that you can thoughtfully develop and deliver information to keep people on the landscape of developing plans and services for handicapped persons. There are various categories of customers for your training activities, there are various ways to go about it, and in all cases it is important to evaluate. I gave you an anecdote about how important it is to Know Your Business; please try to remember some of those things. You may not like my seven point checklist, and if you don't, create one of your own. Even if you do not like or feel comfortable with some aspects of it, you should be thoughtful about training. You should plan training as carefully as you do a service program. You can receive very negative reactions from poorly planned activities of any kind, and that is especially true with regard to training or orientation activities. So, I see this as having helped us into the thoughtful business of orientation training with some of the basic, rudimentary, general kinds of principles which I think are useful and thought-provoking. Now I will stop and hope that this introduction will help us move into the Conference, where we will look in greater detail at many aspects of orientation and training.

training techniques

SUB-GROUP "NEGOTIATION" AND ROLE PLAY

Jim Paul
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DD/TAS

The purpose of this material is to outline a process for training that focuses on alternative approaches to deinstitutionalization. While the training is designed for members of Developmental Disabilities Councils, it can be used for training other groups. The training design, developed by Eugene Watson of the School of Education at UNC-CH, can be used in content areas other than deinstitutionalization. This description is organized as follows:

I. Objectives for Council Members

II. Training Content and Procedures

A. Sub-group Membership

B. General Content and Role Adoption

C. Sub-group Function

D. Specific Content Format

E. Full Council Function

III. Selected Readings List

Negotiation and Role Play Exercise for Deinstitutionalization

I. Objectives for Council Members

Council member participants in the training exercise will, upon its conclusion, be able to:

A. Present the basic characteristics of one approach to deinstitutionalization to other Council members;

B. State certain characteristics of two other approaches;

C. Cite certain advantages and disadvantages of each approach;

D. Provide a brief description of characteristics shared by alternative approaches;

E. Present elements of a Council plan on which at least one facet of each approach is appropriately included; and

F. Replicate the exercise with their respective home Councils.

II. Training Content and Procedure

A. Sub-group Membership

The total training group, to be regarded as a state Developmental Disabilities Council, is divided into as many equal groups as there are approaches to be presented. A sub-group thus formed must consist of a

minimum of three members and should not exceed ten (10) in order to insure maximum effectiveness. An exercise of this nature could accomodate as many as forty (40) participants if one or two additional approaches were presented. Each sub-group will select a representative to present one approach, as its plan, to the full Council. A consultant may not be chosen as the group's representative.

B. General Content and Role Adoption

In this particular session three approaches to deinstitutionalization will be presented: (1) state agency initiated, (2) regional institution initiated and (3) consumer initiated. Each sub-group will assume the role of the group identified in their approach, including values, attitudes, vested interests and concerns. The sub-group leaders will assume the roles of: (1) Director of a state agency for the state agency initiated approach, (2) regional institution Superintendent for the regional institution initiated approach, and (3) Director of the state ARC for the consumer initiated approach. The sub-group members will assume the supporting roles of state agency officials, regional staff, including institutional staff, and consumer organization members respectively.

C. Sub-group Function

Each sub-group will caucus to study one approach to deinstitutionalization in order to prepare a presentation and defense of its approach by the representative. If possible, a consultant, either personally familiar with the approach and/or possessing appropriate materials, will be attached to each sub-group. The sub-groups will be allowed no more than 35 minutes at which time the full group (Council) will reassemble.

D. Specific Content Format

The deinstitutionalization "plan" and rationale developed by each sub-group is to be presented as the best approach under consideration by the Developmental Disabilities Council.* The following format is to be used in the construction of sub-group presentations:

1. Definition of Deinstitutionalization

If deemed important by the group, a distinction should be drawn between deinstitutionalization and depopulation. Definitions of other terms, such as institution, consumer, etc. may be appropriate if time permits.

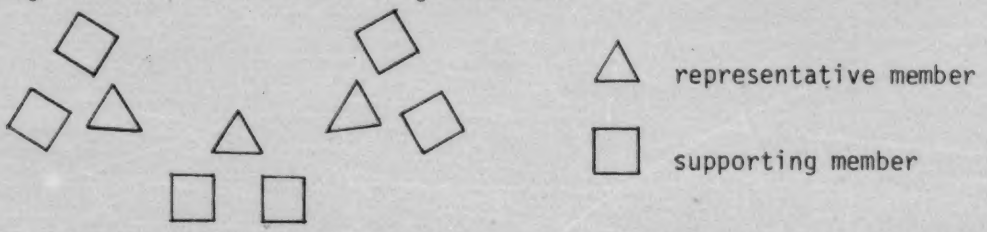
2. Goals

A consideration of who should be deinstitutionalized and when should be included here, in addition to the broader social, economic and political consequences.

*All concrete, data-based rationales and arguments will be derived from a common body of hypothetical information made available to all Council members for work in the session.

E. Full Council Function

The full "Developmental Disabilities Council" will reassemble immediately following the 35 minute sub-group preparation period. The group will be arranged as indicated in the diagram below:



The full Council will be given the assignment of deciding upon the ONE BEST approach to deinstitutionalization from amoung those presented by its constituent groups.

The representative will have exactly five minutes to present a summary of his/her respective group's approach.

After each of the approaches has been presented, the representatives, with the help of their supporting members, will discuss the various alternatives in pursuit of closure on a best choice. To facilitate this, either the supporting members or the representatives can stop the discussion by saying "time", which would send the representative back to his/her sub-group for 30 seconds to receive additional information, suggestions or corrections to enhance their group's power of persuasion. When a break is called, all communication between sub-group leaders ceases for the full 30 seconds. However, all groups may use this time to caucus if necessary. A break may be repeated for an additional consecutive 30 second period only once by the same sub-group. A sub-group is allowed only three calls for time out.

Following the disucssion period, there will be 20 minutes of negotiation wherein the group will yield their sub-group partisan roles in favor of seeking genuine compromise on the issues and content presented.

The final 10 minutes will consist of a debriefing and discussion concerning the process of group decision making. There should be an analysis of the method, including the inevitable tendency towards a "win-lose" battle among sub-groups before movement towards compromise, collaboration and true negotiation begins.

III. Selected Readings

A. To be read prior to session; sent earlier to participants.

1. Paul, "Advocacy Potential of Developmental Disabilities Councils"

2. Thiele, Paul, Neufeld, "Deinstitutionalization of the Developmentally Disabled"

3. Goal Priorities

As a part of the priority considerations inherent in each special interest group, there should be some consideration of the relative importance of (a) prevention of institutionalization, (b) institutional reform and (c) institutional depopulation in a phased program of action. The plan should also consider budget priorities; where and how most of the money should be spent.

4. Program

Each sub-group should identify the essential features of their approach and the basic implementing strategies.

5. Administration

How and where can the program best be administered? Consideration should be given to the issue of centralization vs. decentralization.

6. Assurances and Special Considerations

a. How will the program be evaluated? By whom?

b. How will accountability be managed?

c. Who will monitor the program? How?

d. How will premature depopulation be avoided?

e. How will public education be handled?

f. How will real community services (as opposed to "planned", "anticipated", or "on paper only" services) be assured?

g. Who will advocate for the developmental needs, the continuity of experience and legal rights for the developmentally disabled in addition to basic provisions for room and board?

h. What will be the bureaucratic impact of the program on institutions? Institution staff roles? Unions? Community services? How will this be handled? By whom?

i. What is the likely cost-benefit of this approach?

j. What is the strongest feature of this approach?

The presentation should in some way address the first five issues of the format list. To the extent possible, given the 35 minute time limit, selective responses to topics of particular interest under number six should be developed.

3. Sheerenberger, "Deinstitutionalization in Perspective"

4. Warren, "Role of the Consumer in Planning and Delivering Services"

5. Farah, "State Agency Planning for Deinstitutionalization"

B. To be handed out at the session.

1. Material on each approach to each of the 3 sub-groups

2. Hypothetical data to facilitate deinstitutionalization planning

3. Neufeld, "Deinstitutionalization: An Examination of Approaches"

4. Paul, Watson, Neufeld, "Alternative Approaches to Deinstitutionalization"

THE CASE STUDY

Daniel O'Connell
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Orientation and reorientation of Developmental Disabilities Council Members is indeed an on going process. Regular additions of new members, frequent changes in legislation and the ever changing and dynamic process of rendering services to persons with developmental disabilities mandates that a variety of training techniques be employed to assist Council members in meeting their important responsibilities. A training technique which has demonstrated its broad and varied applicability is the Case Study Process.

The Case Study as training technique is a simple procedure to administer. It is flexible and can be utilized equally well with both new and veteran Council members.

The Case Study Process is defined as that which occurs within a group in response to examining and discussing a given statement which has been created for the explicit purpose of stimulating maximum discussion. The major objective, therefore, of a Case Study orientation approach is the development of a process of open and candid communication within the group.

Organizing a Case Study

One of the major considerations in using the Case Study technique is the actual presentation of the written content to serve as the source for the discussion. An example of a Case Study is attached at the conclusion of this article. The following principles apply to writing a Case Study:

The material should be short, clearly written and to the point. Avoid cumbersome and/or confusing verbiage and keep it to one full page at most. Anything beyond that will tend to lose the group.

The topic chosen for presentation should be sufficiently realistic for the group to relate to it, but it should not be one which is currently a real problem to resolve before the group. If it is not realistic, the group won't identify with it and discussion will wander without purpose. If it is a real issue currently before the group, the discussion will also become "real" and rather than stimulate the process of open and candid communication; old positions will be advanced with members becoming too concerned with the outcome rather than the process.

In other words, if in real life the group is embroiled in, let us say, the pro's and con's of deinstitutionalization, don't use that topic as the content for discussion. Pick instead a less heated issue such as housing or transportation. Participants will be more at ease with it and a more wholesome discussion will result. Thus, pick an issue which is currently a "non issue."

Remember that the material must be designed to stimulate discussion. In order to do so, you should avoid making definitive statements. Instead your material should be provocative and provide the opportunity for members of the group to take opposing positions. If the material doesn't enable the group to do this, the ensuing discussion won't allow the members to engage in such important experiences as resolution of conflict and compromise.

Administering a Case Study

As is true with any group concerned with stimulating discussion, the size of the group has a direct influence on the quality of the discussion. Between six and ten participants are thought to be ideal to engage in a Case Study Process. Although it is not always possible to control the number in attendance, you should be aware of its importance and strive for this ideal in order to provide an opportunity for maximum participation by all members.

The leader of the group has two important functions to perform: he is responsible to give the "charge" to the group and to monitor very strictly the time being consumed in discussion of the material. He is not, however, to enter into the discussion of the issues before the group.

The "charge" would usually be as follows. The leader would pass out the written Case Study to the group and ask them to read it carefully. He would then clarify any confusion about the material and answer any questions which the group might have. Explaining that this material is hypothetical but fairly representative of a real situation, he would emphasize that it offers several options for solution. Pointing out that the group may have to make certain assumptions as they discuss these issues, he then would state that the group has a specific amount of time to come to a position which all of the members can support and commit themselves to implement. At this point, the leader becomes deliberately silent, consciously resists being drawn into the discussion and hopefully the process begins.

The time allowed for discussion is dictated by two factors; complexity of the issue being discussed and constraints upon the group itself. It usually takes about 20 to 30 minutes for the first level of barriers to open communication to breakdown, after which the discussion is noticeably more natural and fluid.

In most situations, an hour for discussion would be reasonable. This has to be very clearly stated at the outset and the amount of remaining time should be announced periodically to the group. If a lip chart or chalkboard is available, it is advisable to write the remaining time at several intervals during the discussion especially as it draws to a close. Attempts will probably be made to get the leader to intervene in the discussion, but he must only restate the charge that the group has a limited amount of time to resolve the problem before them.

Outcome of a Case Study

Although probably not readily apparent to participants, an astute observer of a Case Study experience will quickly note that two distinct processes occur within the group. One process is educational in nature while the second and more important for the purpose of orientation of State DD Council members is an emotional one which is closely related to the basic dynamics of group process.

The educational process which occurs, of course, depends upon the nature and complexity of the topic as well as the variety of background and levels of participant expertise. Assuming that the backgrounds of the

participants are varied, as is true with most Developmental Disability Councils, then of course the points of view expressed will be varied and offer an opportunity for a positive exchange of new information. Aside from sharing specific information about the topic under consideration, the Case Study also offers an educational value in demonstrating to the participants the variety of problem solving skills and strategies brought forth by the other members.

The real value of a Case Study, however, is derived from the emotional processes which are generated within the group. Barriers to communication are removed and members are forced to deal with their inhibitions about participation. Once drawn into the discussion, a sense of belonging to the group is created with an identity as a group member. The benefits derived from the carryover of this feeling to actual Council meetings are immeasurable.

Seeing the Case Study as a "practice" problem-solving experience, it affords the members the opportunity to contribute to the process in a relatively safe environment. Increased confidence and feelings of importance as a contributing member have many implications for future Council meetings involving these members.

Summary

No training technique should ever be perceived as being the absolute answer to all orientation problems. The Case Study method is one technique which should be applied with discretion as the situation dictates. It is comparatively easy to organize and administer. Also, it has the potential to impart new knowledge as well as to give the members a positive problem-solving experience in a "safe" environment. The potential that this has to enable the group to become more open and candid is indeed the real value of this technique.

CASE SUMMARY*

For some time now the Developmental Disabilities Council of Hawaii has been talking about the need for more effective public education, but nothing of any substance has resulted from these discussions. Everyone agrees that there is a problem in this area which should be addressed by the Council, but there is little agreement concerning the exact nature of the problem or possible strategies to be employed. Attempts to formulate a clear written objective have resulted in further polarization and friction among Council members.

One of the problems has been that the term "public education" has various meanings to different Council members. Small factions have formed in support of several popular positions, and there are about five differing views under consideration at this time.

. . . The Council should publish a brochure concerning its purpose, an annual report as well as a series of news releases regarding its work.

. . . The Council should publish a directory of services for persons with developmental disabilities, including a list of major public buildings which are not accessible to handicapped people.

. . . The Council should solicit grant applications for public education projects and commit 20% of its resources in this way.

. . . The Council should set out to strengthen existing public education programs by providing technical assistance to service agencies and help coordinate their efforts.

. . . The Council should commission a study of the attitudes of the general population toward persons with developmental disabilities.

Thus far the staff and Council Chairperson have not forced the issue in the hopes that a resolution would be forthcoming, but the time for a more assertive approach has arrived. Conceivably the Council could make about $25,000 available for this purpose but first the Council has to resolve its planning dilemma.

*This summary was used in the Orientation-Training Conferences.

FORCE FIELD ANALYSIS

Paula Hammer
DD/TAS

The General Design of the Session

This session can best be described as consisting of two phases using distinctly different techniques: written materials used individually; and force-field analysis engaged in by the entire group.

During the first phase, participants were given 20 minutes to read two pages of Federal Regulations dealing with Training Funds under Title XX Social Services program. This phase enabled each Conference participant to have the essential baseline information necessary to discuss training under Title XX. Specifically participants were expected to derive from their reading the Federal criteria concerning:

1) who could receive training funds,

2) who could be trained with Title XX funds,

3) matching requirements of Federal-local dollars,

4) broad program goals.

In addition, some participants had extensive experience with Title XX funds in their home states.

The Force-Field Analysis

In Phase II, the group discussion focused on the training needs of a specific target group (i.e. parents, group home staff, DD Council members). The group used the Force-Field Analysis process to solve the problem: How can we qualify to receive Title XX Training funds to meet the training needs of "X" group?

With this training technique, discussion was centered on the goal of identifying "forces for" and "forces against" qualifying and obtaining Title XX training funds. Statements were listed under each appropriate heading. The group focused its attention on the action goal of obtaining funds under a Federal program for a specific target group. Forces listed in the "against" column included:

1) Conflicts with priorities of state agency administering Title XX,

2) Group home providers not seeing the advantages of training staff,

3) Narrow interpretation of Federal regulations resulting in disqualification of the target group as eligible trainers,

4) Financial limitations.

Forces operating "for" obtaining funds included:

1) Project goals fit well with overall Title XX goals,

2) Consumer groups would endorse the project since they see the need for staff training,

3) UAF could be a resource for trainers, materials, classrooms,

4) Soft "in-kind" match is allowable.

The next step in the process, after enumerating forces "for" and "against", was to examine each item listed to determine which items "for" can be strengthened; which items "against" can be decreased; and to identify which items seem to be the most important. The group may decide some items require further research (i.e., #3 Against above); this is perfectly acceptable. Also, the group may list and document possible responses or strategies for key items, such as generating and documenting consumer support.

Results of This Technique

At all three sessions, participants became very involved in the substantive issues of Title XX funding. The use of written materials helped all participants have common baseline information for the discussion. The Force-Field Analysis process facilitated participation by all group members and allowed for a balanced presentation of concerns. This seemed to help neutralize dominant, biased participants.

Many individuals have difficulty reading, understanding, and analyzing Federal Regulations. The task is boring because the meaning is obscure. Because our design combined technical information processing with action oriented discussion participants actually used the Regulations in the session. They referred back to provisions on eligibility, matching requirements, and administration. The goal-oriented process enabled participants to perceive the relevance of these general provisions to specific and meaningful situations. The discussion provided a context for interpreting the regulations.

Hence, this two phase design was useful in assisting individuals to process abstract, technical data in a meaningful fashion. In addition, the Force-Field Analysis process was seen as a useful problem solving technique. Using this process, groups considered the wide range of strategies for dealing with the "forces." Groups felt that the process could be extended to make individual and group assignments, divide tasks and PERT out all the chores that the group must accomplish.

ROUND ROBIN DISCUSSION

Ronald Wiegerink
DD/TAS

Developmental Disabilities Councils are often confronted with making group decisions on issues which provide no clear-cut resolutions. Since there is rarely consensus and/or mutual understanding on these issues, it is helpful to have discussion which involves the entire membership. Unfortunately, with Councils which average about 25 members, such discussions are often not fruitful if conducted with the entire group. Some members talk too much, some too little, with the discussions rambling and getting side-tracked all too often. An alternative technique for discussion is the round robin format which provides each member with an opportunity to speak and be heard and often assures that the constructive thoughts of all the members are put forward for group consideration.

While there are a variety of round robin formats, the one explored at the Orientation Training Conferences was as follows:

Goals:

The purpose of the session was to examine the value of participant discussion as a vehicle for addressing issues which confront Councils and Council members. The examination involved the use of discussion strategy which involved all participants.

Procedures:

Group members interviewed each other in pairs on three basic topics related to Council goals and decision making. Members then shared the results of the interviews with the entire group, and identified key issues or problems related to each topic area. Next, strategies for dealing with the issues were discussed by all members. Group members experienced (a) interviewing, (b) receiving information about other Councils, (c) discussion of issues, and (d) identification of solutions.

Questions Considered:

1. What are your Council's goals and objectives?
2. How are Council goals and objectives determined?
3. What are the roles of Council membership (agency personnel, providers, consumers) in relation to meeting goals?

Time Schedule:

10 minutes - Introduction and overview

20 minutes - Interviews in pairs

15 minutes - Results and discussion, Question 1

15 minutes - Results and discussion, Question 2

15 minutes - Results and discussion, Question 3

15 minutes - Summary discussion and conclusion

Results:

Participants reported that they found the technique valuable in providing all members with an opportunity for positive communication. Some participants expressed concern over the time and number of persons that could be involved. After discussion, it was concluded that the technique should be reserved for important issues or events worth the additional time. Also, if large groups are involved, the initial interviews should be in groups of three to five people. The technique provides one way to involve new members or visitors in a comfortable setting in which they can share views with other members and vice-versa. It can also be useful in dealing with persistent and complex issues.

A SIMULATION EXERCISE

John Pelosi
Roy Bruninghaus
DD/TAS

The Large Group Session on Planning for Training consisted of a simulation exercise which might be called a mini-drama. Participants played various roles in three different but logically sequenced scenes. (Refer to the three scenarios at the conclusion of this description).

The scenes were:

1. An orientation training team discussing the experiences they had at a recent orientation training conference and making decisions about next steps.

2. A meeting between the orientation training team and their DD Council's executive committee to report their experiences at an orientation training conference and to recommend a plan of action for an orientation training program for the Council.

3. A meeting between the orientation training team and a Council appointed task force on orientation training in order to map out a strategy for implementing an orientation training program for the Council.

Each scene was structured according to a set of directions, with participants being given its general purpose, a specific role to play, a fairly concrete place at which to end the scene, and a time limit in which to do so. The orientation training team appeared in each of the three scenes in order to provide additional continuity and structure. Each participant received an indication of the character role that he should play; for example, "aggressive/negative," "naive/enthusiastic," and "data-oriented/intellectual."

There were a number of reasons that simulation was chosen for the large group session on planning for training. It was intended as a transitional device to move participants in the Conference from a passive-receiving posture to a more active-involving one. It was also used to make specific points about planning for training: (1) that a particular planning model can be helpful in implementing an orientation training program, (2) that orientation training should be a continuing effort for a Council rather than a single event, and (3) that there is a logical sequence of events of next steps for an orientation training Conference.

A number of benefits seemed to accrue from the use of the simulation exercise. Use of the role-play design forced participants to draw upon their own experiences and thereby required that they become more actively involved. The exercise helped to extend the kind of information available to all by involving participants from a number of different Councils. The exercise also allowed the Conference training staff to assess where participants were with respect to the Conference: Were they incorporating ideas and methods generated by the training program? How did they feel about them? How did they feel about the Conference in general? Simulation helped to create "ownership" of training techniques advanced in the Conference by getting the participants actively involved in using them. Finally, the simulation exercise provided humorous entertainment and "comic relief" in an otherwise compact and serious conference schedule.

For those who are interested in using the simulation exercise as part of a training package, we recommend that the following things be considered: Get to know the participants quickly. Select people carefully for key roles - look for people who are flexible, verbal, relatively uninhibited, and who can appreciate humor in a relatively serious situation. Make certain that, if the need arises, these persons are able to carry off the entire exercise on their own. People who are enthusiastic about the idea of a simulation exercise will provide help in setting up the event - everything from getting props to rewriting the script. Participants should be contacted early in the Conference in order to give them time to think about their roles. A narrator is probably essential in most simulation exercises to insure that timelines are adhered to and that progress is made toward the goals of each particular scene.

There are potential problems with simulation exercises: If not designed with reasonable sensitivity to the participants, bad feelings may be the result; participants can get so carried away with the comedy that they never settle down to making key points; although simulation exercises at a training conference usually attract enough participants, there may be reluctance to participate in the formal setting of regular Council meeting - particularly if the roles to be played are "too close to home;" and finally, it is entirely possible that simulation exercises can fall very flat without good people in the key roles.

DD/TAS was fortunate to have at each of its orientation training Conferences an excellent group of participants. Subsequently, the staff found that the benefits of the simulation exercise far outweighed its potential problems. Although the instructions for the scenes and for the character roles were the same in each of the three Conferences, each simulation exercise developed differently. The significant variable seemed to be the styles of those who participated. This fact reinforces the notion that a simulation exercise will probably be an excellent training device if "good" people volunteer to play the key roles. It also suggests that a simulation designed around key roles probably has the best chance of being a successful activity.

DIRECTIONS

SCENE I (10 minutes)

1. Chairperson
2. Planner
3. Narrator
4. Steward (ess)

OTC Team on plane going home

Discussion to reflect the fact that team has just left conference and are talking about impressions:

1) Humorous jabs at DD/TAS

2) Range of feelings about such a Conference - the implications of it - refer to plans written while at Conference.

3) Serious discussion about:

   a) how team wants or can be involved in a program to provide their Council with orientation training.

   b) plan for involvement - how to proceed?

   c) move toward initial decisions about what needs to be done next.

Outcome:

4) Make decisions about:

   a) team involvement: both will report to executive committee of their Council.

   b) the team's plan and how to introduce it to the Council: the team will indicate to executive committee that they have a plan and give them a choice of hearing it and/or starting from scratch.

DIRECTIONS

SCENE II (15 minutes)

1. Chairperson
2. Council Staff person
3. Plan/Eval Committee Chairperson
4. Grant Review Committee Chairperson
5. Legis. Review Committee Chairperson
6. Adv. Committee Chairperson

Team meeting with Executive Committee of D.D. Council

A. Team makes report on Pheasant Run Orientation Training Conference to Executive Committee. Report should end on these notes:

   1) We need to look at whole question of orientation/training needs of our Council.

   2) Need to think about orientation/training as a continuous process rather than a one-shot affair.

B. Reactions from different members of the Executive Committee according to their styles and according to some of the issues.
   INJECT HUMOR BUT TRY TO HIGHLIGHT SOME OF THE ISSUES YOU SEE RELATED TO O/T.

C. Continue above dialogue/acting out styles, but try to begin moving from humor with no direction to a positive conclusion.

Outcome:

D. Conclude with:

   1) Concern about training - at very least to discover if training needs exist and what kind.

   2) Appoint task force to consider training needs.

   3) Specify objectives of task force:

      a) to draw up a plan for orientation/training of:
         - new Council members leave it general or
         - total Council membership-------select a group
         - other target groups

      b) appoint task force membership
         - Planner or Chairperson
         - Consumer
         - Provider
         - UAF representative

      c) appoint task force chairperson
         - either the Planner or the Chairperson

DIRECTIONS

SCENE III (15 minutes)

1. Chairperson or Council Staff Person
2. Consumer
3. Provider
4. UAF/R&T Representative

Meeting of Task Force on Orientation/Training
(meeting chaired by task force chairperson)

A. Chairperson lays out group task: draw up plan for orientation/training of Council members or some designated group. Provides some background/ humor.

B. Reactions from Task Force members acting out their role as a consumer, provider, etc. and according to the particular style. INJECT HUMOR TO HIGHLIGHT ISSUES WHICH SERVE AS CONSTRAINTS TO THE TASK.

C. Continue above dialogue/acting out styles, but begin to move discussion having no direction toward more positive, productive ends.
One way to do this is to use the 7 question format:
What? Who? How? Why? When? Where? What Happened?

D. Narrator will cut off this scene when positive productive movement is apparent.

(Narrator: Make sure summary of issues occurs after discussion)

VIDEOTAPING

Gary Richman
DD/TAS

The Problem and Our Solution

The assigned task, to develop a presentation for the Conferences on Training for DD Council Orientation, which would provide an update on the status of the DD Legislation and some analysis of it, presented several problems. First, legislative language can be a very tedious subject. Second, the legislation had been an important issue for well over a year and as such had already been part of nearly every conference attended by people involved and interested in developmental disabilities. Third, one of the goals of the Conferences was to model effective and replicable orientation training techniques.

Paula Hammer of DD/TAS developed the idea for videotaping interviews with key Congressional leaders about prospects for passage of the DD bill, the projected shape of compromises between the House and Senate versions, and Congressional intent concerning certain provisions and broad policy perspectives of the DD program. It was decided that on-spot-analysis and discussion at the Conferences would supplement the videotape and provide information about the specifics of the legislation. If additional back-up was needed, printed materials would be distributed.

Securing interviews was successful due to a combination of advanced planning, modest requests, great persistence, and to some degree, the attraction of the video camera for political people. A letter sent well in advance requested five minutes of the Congressman's time on one of two days to be interviewed on several specified topics relating to the DD Legislation. Follow-up phone calls informed the Congressman's staff where our equipment would be set up and inquired about the time when we could expect the Congressman to come by. A helpful tip: all those who specified a time did show up; those who promised to drop by sometime during the two days never made it.

We then enlisted the services of Jane Belau (President of NCDD, and Chairperson of the Minnesota DD Council) to conduct the interviews, because she is thoroughly knowledgeable about both DD and the legislative process and because she is an adept interviewer.

Logistics were handled by Buz Lloyd of the DD/TAS staff. One day of running among the maze of offices including Rep. Al Quie's office (R-MN), our contact on Capitol Hill, the office of the Majority Leader of the House, the House Press Gallery, the office of the Architect of the Capitol and the Capitol Police, got us everything needed including permission to use the Capitol grounds, a location to use electricity and a parking space. The office of Sen. Harrison Williams (D-NJ) even arranged a spot for us under the Capitol rotunda in case of rain. The significant part of this experience was not that it was slightly complicated (it was, slightly) but that people were so incredibly cooperative. We got everything we asked for including the rescheduling of groundkeepers so that lawn mowers and grinding equipment wouldn't disrupt the interviews. (I only wish we had thought to ask them not to run sprinklers on the night after the first day's taping).

Cost for the entire project was quite reasonable. The largest item was travel. (If a state DD Council is replicating this type of video project,

you probably already live in your state Capitol). Video equipment was borrowed although it can be rented. We paid about $60.00 for three hours of video tape and an additional $40.00 to the UAF at the University of North Carolina for their assistance and equipment used to edit the interviews to the 35 minutes we used.

The Presentation

The taping took place on July 29 and 30, 1975, two ideal days, because the House-Senate Conference committee was meeting to iron out the final compromise version of the DD Legislation. We would like to take credit for skillful selection of those key dates, but in fact they were chosen way in advance as the only two days people and equipment could be gathered together.

The presentation was designed as a TV evening newscast and acquired the title "The DDTV News." To suit this conception the tape was recorded and edited into segments which were introduced by a live "anchorperson" and followed up with live analysis. The live portions of the presentation were handled by Paula Hammer, Jane Belau, and Gary Richman. The tape segments were as follows:

Segment 1: The first segment included three interviews with members of the House about the prospects for passage of the DD legislation and how the differences between the House and Senate versions ought to be resolved. There were some predictions about the expected outcome of the compromises (such as the specific standards which were Title II of the Senate version) and the expected timetable for passage. There was also some insight into the mechanics of the House-Senate Conference process. Each of the Congressmen also offered his personal perspective on which portions of the DD Legislation were most significant. The three Congressmen interviewed in this segment were:

a. Rep. Paul Rogers (D-Fla.) Chairman of House Sub-Committee on Health and Environment

b. Rep. Dr. Tim Lee Carter (R-KY) ranking minority member on that sub-committee

c. Rep. L. Richardson Preyer (D-NC) a member of the sub-committee

Segment 2: In a continuation of the interview with Rep. Preyer, he discussed his concerns about deinstitutionalization, and the mandate for it in the legislation. He also offered some insight into Congressional intent about how that mandate ought to be carried out.

Segment 3: Interviews with Senators on their perspectives of the shape of the new DD legislation revealed general agreement with the compromises as outlined in the interviews with House members, and the commitment also expressed by the House members to get the legislation to the President. The Senators were:

a. Sen. Jennings Randolf (D-WV) Chairman of the Senate Sub-Committee on the Handicapped

b. Sen. Robert Stafford (R-VT) ranking minority member on that committee

Segment 4: Stepping back from the immediate problem of passing the DD bill, this segment looked at the significance and impact of the DD legislation, focusing special attention on the planning and advocacy function of DD Councils. Interviews were with:

a. Sen. Walter Mondale (D-MN) a member of the Sub-Committee on the Handicapped and Chairman of the Senate Committee on Children and Youth

b. Paul Marchand, Government Affairs Director for the National Association for Retarded Citizens

c. Sen. Edward Kennedy (D-MA) a member of the Sub-Committee on the Handicapped

Segment 5: The fifth segment looked to the Administration for how they viewed the impending legislation and what it meant to their administration of the DD Program. Interviews were with:

a. Francis Lynch, Director of the Developmental Disabilities Office

b. Stanley Thomas, Assistant Secretary of HEW for Human Development

Segment 6: Not all programs that affect developmentally disabled people are in the DD legislation. On the day of the interviews the House overwhelmingly passed the Special Education of All Handicapped Children Bill. An interview with Re. Al Quie (R-MN), ranking minority member on the House Committee on Education and Labor about the special education legislation pointed out the significance to the DD population.

Some Concluding Thoughts

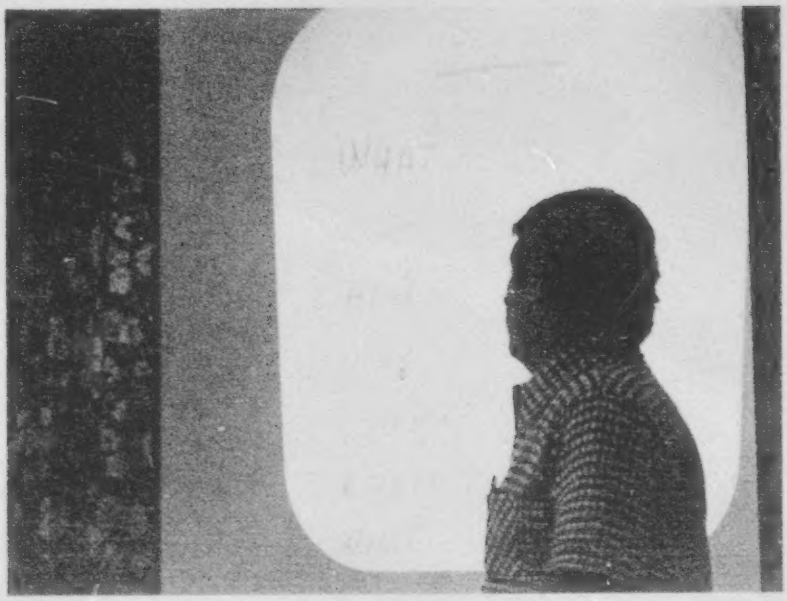
There are several things we learned from this experience that are valuable to pass on. First, the use of video tape helped us develop (if we may modestly infer from the feedback) an interesting and useful presentation on the DD Legislation. With most of the presentation on tape, it was easy to "package" and loan after the three Conferences. This was not our original intention and had it been, we might have made several decisions differently in the process of recording the interviews and editing so that a more complete presentation would have been included in the package.

There were some secondary benefits from producing the tape beyond the gathering of information and insights about the DD Legislation. The interviews showed where various legislators stood in regard to specific issues, and gave some strong indicators of levels of knowledge and commitment, valuable information for those involved in influencing policy.

Moreover, we got the feeling that our presence on the Capitol lawn, with a camera, assorted electronic equipment and a waiting audience, served as a strong indicator to the Congressmen that there was a large, interested, expectant constituency waiting impatiently for them to finish their work. Now, we claim no responsiblity for the passage of the DD Act. However, we couldn't help but wonder had we been there the last time the House and Senate were ready to confer on a compromise version would it have made a difference? It is an open question to be kept in mind.

Finally, but perhaps most importantly, the presentation format is replicable, especially by DD Councils at the State level as part of their training and orientation activities. The costs are reasonable; the logistical problems not too formidable; topics abound and interesting people are almost always willing to appear before a camera.

planning



A GUIDE FOR DESIGNING AND IMPLEMENTING ORIENTATION ACTIVITIES

Jim Paul
Pascal Trohanis
Roy Bruninghaus
Ann Ramsbotham
DD/TAS

INTRODUCTION

In addition to the variety of training activities, the Conferences included an individual state team planning session. Each team, with the help of a staff assistant, developed specific plans for identifying and/or meeting the orientation needs of their Council. To facilitate the planning process, a "Guide for Designing and Implementing Orientation Activities" was developed. This section will feature a description of the guide.

This guide contains two checklists which address some of the most salient issues and which can be used in structuring the planning time. One checklist is a needs assessment form which provides a framework for determining specific orientation training needs. The second one is an orientation planning ckecklist for those State teams already able to specify their training needs. Included in the guide are suggestions for making most effective use of the two formats. Also included are sample state plans for the reader's perusal.

Background and Purpose

The purpose of this guide is to assist in the planning for meeting the orientation needs of DD Councils. This guide features two types of planning. The first, Type I, involves planning for planning or simply referred to as planning without data. The second, Type II, concerns planning for implementation, or planning with data.

Planning involves specifying needs, activities to meet those needs, resource allocation, a way to determine the effectiveness of the activities, and the benefits in meeting needs relative to the costs for the activities. Planning is much more, however, than the process of developing a future map.

Planning involves people and it occurs in a social, political and economic context. In addition to the formal and technical process for developing a plan, preparation must be made for the planning activity. Such preparation includes, for example, decisions about the priority of the planning, need for a plan, resources required to support it, who will be involved, and the general focus of the planning. Planning, finally, is a process to facilitate more effective, efficient, and purposeful organizational behavior.

Planning without Data

Type I planning, planning for planning, involves the systematic preparation that is a necessary precursor to orientation planning. It focuses on identifying needs in a Council over time as a data base for planning orientation activities. The plan for planning must include, for example, the goals, structure and process to be used in assessing needs. In the absence of data on needs, this is the point for beginning for orientation.

Several decisions must be made about the assessment of needs:

Why the need must be identified?

What kinds of needs?

How will the needs be determined?

Whose needs will be assessed?

When will the needs be assessed and how often?

How will the findings be validated? By whom?

How will the need data be applied to implementation planning?

Who will determine the priorities of needs identified? By what process?

How will the needs assessment process be organized and orchestrated with other activities?

What resources will be required?

How will we know when we have current needs identified?

These questions should concern anyone planning for needs assessment. A needs assessment is, therefore, the implementation of a plan that idendifies the need for the data, the program area(s) of the data, the objectives, the implementation strategy and the manpower by which it will be evaluated.

Section 1 of this guide identifies components of planning without data. It also contains a needs assessment checklist and sample form for Type I planning. Section 2 includes a specific needs assessment procedure referred to as the Nominal Group Process.

Planning with Data

Type II planning refers to orientation planning based on needs data. This type of endeavor responds to a need or presumes some awareness of the need.

There are numerous sources and types of data. Some data are more definitive as a public "fact" that has been or can be systematically verified. This "hard data" is usually preferred for accountability. Other data are "softer," less public, more subjective, and not easily subjected to proof. However, it is no less real, no less a fact, and certainly no less important. These data come from the beliefs of people based on their own experiences. "I believe we need . . ." is a "data base" and a place to begin. The important thing is that we must recognize where we begin and the authority to which we appeal in defending our plan.

A useful distinction at this point is between data and information. Data does not have meaning until we incorporate it into some set of values. Our valuing of data transforms us according to the use we have for it, and the model into which we fit it.

Data on the knowledge and skill base of the Council becomes meaningful information when we examine that data, in relation to a preferred or ideal model of competencies of members of an effective Council, for the purpose of determining the orientation needs of the Council. This same data can suggest both needs to be met and resources for meeting those needs. Many of the orientation needs of Councils can be met by resources in the Council. A plan for identifying each kind of data serves the orientation interest.

Section 3 of this guide identifies the components of planning with data. It contains a checklist, with an example, and describes the process for planning based on needs data.

This guide seeks to assist in both Type I and Type II orientation planning for Councils. It is hoped that Type I and Type II planning formats presented will facilitate the planning process and improve each state's plan for Council orientation.

SECTION 1

INTRODUCTION TO PLANNING WITHOUT DATA
(Type I Planning)

Background and Purpose

Type I planning, which involves a needs assessment process, revolves around the checklist enclosed in this section of the guide. It was the intent of DD/TAS to develop an easy-to-fill-out and useful checklist which addresses the most important points for developing and implementing Council orientation activities. If the state team feels that their Council does not have sufficient data to determine and plan for their specific orientation training needs, completing the Type I format will provide them with a framework for assessing those needs.

We hope the state teams at the Conference who feel that they can begin completing this form will endeavor to do so. In this way, the team can return to their state with a fairly definitive assessment plan for sharing with other Council members. Also, the plan can provide the basis for further specific planning actions and eventual implementation.

How to Use

During the Conference planning session, general Council orientation activities, data, and needs should first be discussed. With the help of the DD/TAS planning assistant, the State Team will then be responsible for completing the checklist. The checklist is self-explanatory, hence it will not be described. The group may wish to complete the form(s) together in an "out loud" fashion or each team member may complete them in silence and then share the results. Of course, the assistant is present to serve as a resource. It is suggested that a separate form be filled out for each identified target group.

Each planning group should keep in mind that this process will yield a foundation of information upon which to construct a plan for determining the orientation training needs of selected target audiences. Once the needs assessment process has been completed by the Council, the training team can go on to Type II planning.

When Finished

At the conclusion of the planning session, the DD/TAS assistant will collect the team's checklists. This action will permit the lists to be copied and shared with other Conference participants and DD/TAS, which might be called upon later for follow-up technical assistance. The original checklists will be returned to each team before the end of the Conference.

In addition, the planning assistant will solicit feedback from team members on the usefulness and format of the checklist and Type I planning. This data will help DD/TAS and NCDD in designing future Conferences of this nature.

NEEDS ASSESSMENT FORMAT

*** TYPE I ***
(Example)

DATE 6/1/75

NEEDS ASSESSMENT COORDINATOR: Sam Jones

STATE N.Y.

1) KINDS OF NEEDS TO BE ASSESSED:
Council Training Needs

2) NEED ASSESSMENT TARGET GROUP: — COMPLETION DATE:

- [X] New Council Members — 7/1/75
- [ ] Existing Council Members
- [ ] Administering Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [ ] Others

3) PURPOSE(S) OF NEED ASSESSMENT:

To enable: The Task Force on Training

To make decisions about: the contents of an orientation program for the new Council members selected on 6/1/75

4) NEEDS ASSESSMENT RESOURCES:

A. PERSONS Council Task Force on Training, Council Staff, Consultant X, Y, Z

B. ORGANIZATIONS
DD/OA
Dept. of Continuing Education
NYU

C. MONEY
$5,000.00

D. OTHER

5) SPECIAL CONSTRAINTS:
$5,000.00

6) IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for, and Implemented

- [ ] Large Group
- [X] Small Group
- [ ] Individual

* * * * *

- [X] Group Process
- [ ] Written Instrument
- [ ] Interview
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s)
State Office Bldg. Room 401
6/23/75
2. Transportation
own
3. Equipment & Materials
Flip charts, file cards
4. Communication Task Force on Training
5. Budgeting Task Force and staff
6. Accommodations
None

7) PRIORITY SETTING ACTIVITIES:

Who?

- [ ] Individual
- [X] Group New Council members and Task Force Leader

Techniques?

- [X] Formal Nominal Group Procedure
- [ ] Informal

SECTION 2

THE NOMINAL GROUP PROCESS

Introduction:

Andrew H. Van de Ven and Andre L. Delbecq describe their Nominal Group process as " . . . a structured meeting which seeks to provide an orderly procedure for obtaining qualitative information from target groups who are most closely associated with a problem area."* The potential usefulness of the Nominal Group Process as an instrument to identify and to give priorities to needs for orientation training can be offered. The Nominal Group Process:

1) allows target groups to single out critical problem dimensions by means of a group process which is unthreatening, depersonalized and essentially democratic:

2) clarifies the meaning of critical items for participants through discussion;

3) can be used to explore both the "objective" and the "subjective" dimensions of a problem area;

4) identifies the priority foci of a group (or groups) on a needs assessment problem by means of voting procedures;

5) can be implemented at low cost in a short time period.

The Nominal Group Process is most efficient when the group using it contains between five and eight participants. Participants should be selected on the basis of their ability to contribute expertise to the needs assessment question. It is possible that Councils may wish to identify a number of different groups in order to identify and to compare the priority foci of each group. Decisions can then be made by the Council on how to integrate different priority foci from different groups.

*Andre L. Delbecq and Andrew H. Van de Ven, "The Nominal Group as a Research Instrument for Exploratory Health Studies", AHPH, (March, 1972).

THE NOMINAL GROUP PROCESS FOR
SETTING NEEDS ASSESSMENT PRIORITIES
FOR ORIENTATION TRAINING

Steps for the Recorder to Follow

STEP 1) Read the question and see if it is something to which participants can respond. Do they understand it?

STEP 2) Ask participants to jot down their responses to the question: concise and specific phrases.

STEP 3) Write items taken from each person (round robin, one item per person at a time) on a piece of butcher paper. Overlap is O.K. Redundancy is O.K.

STEP 4) Check item for content clarity (understanding ONLY). Combine redundant items by numbering. Do not combine ahead of yourself; combine only items which have been clarified.

STEP 5) Have participants pick five most important items and put one item on each file card (total of five file cards). Write clusters of numbers, if items are combined in that manner. Treat each cluster as one group.

STEP 6) Rank each of the five items. Put a (5) on the card with the most important item; a (1) on the card with the least important item.

STEP 7) Put on butcher paper the chart below.

Column 1	Column 2	Column 3	Column 4	Column 5
Item Numbers	Rank by Each Person	Sum of Ranks	Weighted Sum	Priority

STEP 8) Ask for items (Column 1) and their ranks (Column 2) from each participant, round robin, one item at a time, starting with the most important item, until each participant's list of five is exhausted.

STEP 9) Complete the chart by multiplying the sum of the ranks (Column 3) by the number of persons giving each item its rank (Column 2). The highest weighted sum is the top priority.

STEP 10) Restate each prioritized item in good English and record on summary sheet.

NEEDS ASSESSMENT PRIORITIES FOR ORIENTATION TRAINING

PRIORITY 1

Statement:

PRIORITY 2

Statement:

PRIORITY 3

Statement:

PRIORITY 4

Statement:

PRIORITY 5

Statement:

Date of Needs Assessment Session

SECTION 3

INTRODUCTION TO PLANNING
(Type II Planning)

Background and Purpose

Type II planning, referred to as orientation planning based upon needs data, is the focus of the planning checklist enclosed in this section of the guide. It was the intent of DD/TAS to develop an easy-to-fill-out and useful planning checklist which comprises and addresses the most salient considerations for developing and implementing Council orientation activities.

We hope the state team at the Conference who feel that they can begin completing this form will endeavor to do so. In this way, the team can return to their state with a fairly definitive plan outline for sharing with other Council members. Also, the plan can provide the basis for further specific planning actions and implementation.

How to Use

With the help of the DD/TAS planning assistant, the State Team will be responsible for completing the checklist. During the Conference planning session, general Council orientation activities, data, and needs should first be discussed. Afterwards, a decision should be reached if indeed there is sufficient data to move ahead with Type II planning.

Assuming there is sufficient data, it is suggested that Council orientation topics or content be outlined and prioritized. Once this task is completed, the assistant and team can begin to complete as many checklists as necessary. The checklist is self-explanatory, hence it will not be described. The group may wish to complete each form together in an "out loud" fashion or each team member may complete them in silence and then share their results. Of course, the assistant is present to serve as a resource. Each planning group should keep in mind that this process will yield a foundation of information upon which to construct an eventual, ongoing plan for orienting selected target audiences to an exciting array of DD topics.

When Finished

At the conclusion of the planning session, the DD/TAS assistant will collect the teams' checklists. This action will permit the lists to be copied and shared with other Conference participants and DD/TAS which might be called upon for follow-up technical assistance. The original checklists will be returned to each team before the end of the Conference.

In addition, the planning assistant will solicit feedback from team members on the usefulness and format of the checklist and Type II planning. This data will help DD/TAS and NCDD in designing future Conferences of this nature.

** TYPE II ** (Example)

ORIENTATION AREA OR TOPIC New Federal legislation on Developmental Disabilities DATE 6/1/75

COUNCIL TRAINING COORDINATOR _____ STATE N.Y.

STATEMENT OF ORIENTATION NEED:

It is new legislation and many Council members are not fully aware of its intents or implications

How do you know this is a need? A needs assessment was conducted.

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning DD Division-Council's legislative committee

B. Persons for Training Staffs of local UAF

C. Audiovisuals

D. Organizations DD/TAS

E. Money $5,000.00

F. Print Materials legislation and regulations

G. Other

SPECIAL CONSTRAINTS:

None

ORIENTATION TARGET AUDIENCE:

- [X] New Council Members
- [X] Existing Council Members
- [ ] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [ ] Others

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [ ] Change a target's attitude
- [ ] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

1) To acquaint all Council members with the intent and the provisions of the new DD legislation.

2) To explore the implications of the new DD legislation.

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [X] Large Group
- [X] Small Group
- [ ] Individual

* * * * * * *

- [ ] Case Study
- [X] Lecture
- [X] Panel
- [ ] Simulation
- [ ] Interviews
- [X] Group Discussion
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s) Room 300H State Office Bldg. 8/8/75 - 8/9/75

2. Transportation on their own

3. Equipment and Ordering Materials Copies of new leg. and Regs.

4. Communications Tr. Committee

5. Budgeting & Reimbursements Tr. Comm. & Council Staff

6. Hotel Accomod. None

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:

- X Feedback Sheets
- — Interview
- X Participant-Observers
- — Test
- — Other

2. Follow-up Activities Desired:

X Yes __ No __ Maybe

If yes or maybe, what activities might be needed:

in 3 mos. leg. committee will be asked to identify what has happened as a result of the workshop.

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task design agenda
   Person Tr. Comm & Leg.
   Timeline by 6/8/75
2. Task Id Resources
   Person Tr. Comm.
   Timeline by 6/22/75
3. Task Invite Partici-
   Person Tr. Comm.
   Timeline 7/1/75
4. Task Prepare budget
   Person staff
   Timeline 7/15/75
5. Task handle logistics
   Person Conf. coor.
   Timeline 7/1/75-8/8/75

SAMPLES OF STATE PLANS

Ann Ramsbotham
DD/TAS

The majority of state teams chose to complete at least one of the checklists included in the planning guide and in some cases, two types of plans were developed by a team - both to design training activities to meet a specific need, and to determine other needs. Examples of plans are attached which illustrates the variety of orientation training needs among Councils. The following outline indicates the areas for which plans were developed by individual states.

AREA	STATE(S)
Needs Assessment Format	Connecticut, Kansas, Nevada, Colorado, Georgia, Vermont, Utah, New Jersey, Virgin Islands, Indiana, California
New Legislation	New Mexico, Illinois, Oregon, Washington, Alabama, Virgin Islands, Virginia
Comprehensive Orientation to the DD Field (aimed at a variety of target audiences)	Maine, Puerto Rico, New Mexico, Delaware, Maryland, Mississippi, New Jersey, Minnesota, District of Columbia, Ohio
Planning	District of Columbia, Ohio
Deinstitutionalization	North Carolina, Kentucky
Councils' Role and Function	South Carolina, Virginia, Florida
Advocacy	Virgin Islands
Public Awareness	Virginia
Alternative Information Systems	Wisconsin
Service Delivery System	Idaho
Decision Making	Pennsylvania
Plan and Grant Review	Oregon, Utah
Evaluation	California

Enclosed are (ten) samples for reader perusal.

*** TYPE I ***

NEEDS ASSESSMENT FORMAT

DATE August 20, 1975

NEEDS ASSESSMENT COORDINATOR: DD Staff

STATE California

1) KINDS OF NEEDS TO BE ASSESSED:
Basic information needs

4) NEEDS ASSESSMENT RESOURCES:

A. PERSONS Council member, staff, Area board chairpersons, Reg. Ctr. chairperson

B. ORGANIZATIONS UAF, Advocacy groups

C. MONEY

D. OTHER

5) SPECIAL CONSTRAINTS:
Staff time

2) NEED ASSESSMENT TARGET GROUP:

- [X] New Council Members
- [X] Existing Council Members
- [ ] Administering Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [ ] Others

COMPLETION DATE:
October 1

3) PURPOSE(S) OF NEED ASSESSMENT:

To enable: DD staff and augmented UAF committee

To make decisions about: The Basic Training Needs of Council members

6) IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for, and Implemented

- [X] Large Group
- [X] Small Group
- [X] Individual

* * * * *

- [X] Group Process
- [X] Written Instrument
- [X] Interview
- [X] Other: Phone Calls

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s)
8/25-Review w/ Morris
8/25-UAF Committee
9/5-Council Exec. Committee
9/11-Full Council
2. Transportation
3. Equipment & Materials
4. Communication Gain authority for UAF committees
5. Budgeting Prioritize needs
6. Accommodations

Gain approval to conduct assessment List needs

7) PRIORITY SETTING ACTIVITIES:

Who?

- [ ] Individual
- [X] Group UAF Training Committee (10) members

Techniques?

- [X] Formal Nominal procedure
- [ ] Informal

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*** TYPE I ***

NEEDS ASSESSMENT FORMAT

DATE Sept. 11, 1975

NEEDS ASSESSMENT COORDINATOR: To be assigned

STATE Indiana

1) KINDS OF NEEDS TO BE ASSESSED:
Council information needs relative to changing role vis a vis new DD act

2) NEED ASSESSMENT TARGET GROUP:

	COMPLETION DATE:
☐ New Council Members	
☒ Existing Council Members	November 15, 1975
☒ Administering Agency Personnel	November 15, 1975
☐ Other Implementing Agency Personnel	
☐ Legislators	
☐ Consumer Agencies	
☐ Others	

3) PURPOSE(S) OF NEED ASSESSMENT:

To enable: The Council to develop the knowledge base to implement the mandate of the new DD legislation

To make decisions about:

4) NEEDS ASSESSMENT RESOURCES:

A. PERSONS
Council staff

B. ORGANIZATIONS
UAF DD/TA

C. MONEY Existing administration and planning dollars

D. OTHER Training kit (DD/TA)

5) SPECIAL CONSTRAINTS:
Congress may not act
Time (By Nov. 15)
Materials development

6) IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for, and Implemented

☒ Large Group
☒ Small Group
☐ Individual

* * * * *

☒ Group Process
☒ Written Instrument
☐ Interview
☐ Other Retreat

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s)
State park - Early November

2. Transportation
Individual

3. Equipment & Materials
As appropriate
Multi Media

4. Communication Council staff

5. Budgeting Staff

6. Accommodations Staff

7) PRIORITY SETTING ACTIVITIES:

Who?

☐ Individual

☒ Group Council & Administering Agency Personnel

Techniques?

☒ Formal Nominal group

☒ Informal Retreat environment itself

86 87 88

*** TYPE I ***

NEEDS ASSESSMENT FORMAT

DATE August 7, 1975

NEEDS ASSESSMENT COORDINATOR: Ralph McCain and Liz Totty

STATE Georgia

1) KINDS OF NEEDS TO BE ASSESSED:
Council training needs: Basic information needs
Appropriate ways of accomplishing needs

2) NEED ASSESSMENT TARGET GROUP:

	COMPLETION DATE:
☐ New Council Members	
☒ Existing Council Members	September 7, 1975
☒ Administering Agency Personnel	September 7, 1975
☐ Other Implementing Agency Personnel	
☐ Legislators	
☐ Consumer Agencies	
☐ Others	

3) PURPOSE(S) OF NEED ASSESSMENT:

To enable: Task force on training - group process

To make decisions about:
Design basic package
information and effective presentation of this package

4) NEEDS ASSESSMENT RESOURCES:

A. PERSONS
Consultants in presentations, Agency people involved
B. ORGANIZATIONS
VD/TAS, Continuing Ed., etc. depts. at local university
C. MONEY Not a real issue
D. OTHER Orient. Notebook - information resources

5) SPECIAL CONSTRAINTS:
Insure commitment of agency people

6) IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for, and Implemented

☐ Large Group
☒ Small Group
☐ Individual

* * * * *

☐ Group Process
☒ Written Instrument
☒ Interview w/videotape
☐ Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s)
Retreat sort of place

2. Transportation Own

3. Equipment & Materials
flipcharts, video, overhead, material packages

4. Communication Task force

5. Budgeting Staff person

6. Accommodations

7) PRIORITY SETTING ACTIVITIES:

Who?

☐ Individual

☒ Group

Techniques?

☐ Formal

☒ Informal

*** TYPE I ***

NEEDS ASSESSMENT FORMAT

DATE August 21, 1975

NEEDS ASSESSMENT COORDINATOR: Chris Winokur

STATE Colorado

1) KINDS OF NEEDS TO BE ASSESSED:
Council training needs

4) NEEDS ASSESSMENT RESOURCES:

A. PERSONS
Staff
Chairpersons

B. ORGANIZATIONS

C. MONEY
Mailing costs

D. OTHER Own knowledge-information shared with other participants at Portland meeting

5) SPECIAL CONSTRAINTS:

2) NEED ASSESSMENT TARGET GROUP:

		COMPLETION DATE:
[X]	New Council Members	End of September
[X]	Existing Council Members	
[ ]	Administering Agency Personnel	
[ ]	Other Implementing Agency Personnel	
[ ]	Legislators	
[ ]	Consumer Agencies	
[ ]	Others	

3) PURPOSE(S) OF NEED ASSESSMENT:

To enable: Staff, Chairman, Vice-Chairman Chairpersons, Executive Board

To make decisions about: Survey which will be a major part of determining Council's training needs

6) IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for, and Implemented

- [ ] Large Group
- [X] Small Group
- [X] Individual

* * * * *

- [X] Group Process
- [X] Written Instrument
- [ ] Interview
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s) August 30 - after Executive Board Meeting
2. Transportation Own
3. Equipment & Materials
4. Communication Phone, Personal
5. Budgeting
6. Accommodations

7) PRIORITY SETTING ACTIVITIES:

Who?

- [ ] Individual
- [X] Group

Techniques?

- [ ] Formal
- [ ] Informal

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** TYPE II **

ORIENTATION AREA OR TOPIC: Introduction to DD, Review, Member Roles

DATE: September 11, 1975

COUNCIL TRAINING COORDINATOR: Eunice Davis

STATE: Minnesota

STATEMENT OF ORIENTATION NEED:

Introductory - Historical and Council Member roles

How do you know this is a need? Many are new to field

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning: Bob Brunsvold and Staff

B. Persons for Training:

C. Audiovisuals: X

D. Organizations:

E. Money:

F. Print Materials: X

G. Other: Lecture and Discussion

SPECIAL CONSTRAINTS:

ORIENTATION TARGET AUDIENCE:

- [X] New Council Members
- [ ] Existing Council Members
- [ ] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [ ] Others

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [ ] Change a target's attitude
- [X] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

See Need Statement
Introduction to D. D.
Historical Background

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [ ] Large Group
- [X] Small Group
- [ ] Individual

* * * * * *

- [ ] Case Study
- [X] Lecture
- [ ] Panel
- [ ] Simulation
- [ ] Interviews
- [ ] Group Discussion
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s): 1/2 day before regular meet.
2. Transportation:
3. Equipment and Ordering Materials: DD/TA & State Man.
4. Communications: DD Staff
5. Budgeting & Reimbursements: Staff
6. Hotel Accomod.: Make own/Parking

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:
   - [ ] Feedback Sheets
   - [X] Interview Staff design
   - [ ] Participant-Observers
   - [ ] Test
   - [ ] Other
2. Follow-up Activities Desired:
   __Yes __No __X__Maybe
   If yes or maybe, what activities might be needed:

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task: Coordination
   Person: Eunice Davis
   Timeline: 3 weeks
2. Task: Content
   Person: Eunice Davis
   Timeline: 3 weeks
3. Task: Logistics
   Person: DD Staff
   Timeline:
4. Task:
   Person:
   Timeline:
5. Task:
   Person:
   Timeline:

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** TYPE II **

ORIENTATION AREA OR TOPIC *Developmental Disabilities: The Council: Who, What, Where, When, How* DATE *August 7, 1975*

COUNCIL TRAINING COORDINATOR *Sue Howell* STATE *New Jersey*

STATEMENT OF ORIENTATION NEED:

To give legislators a general background in DD issues & the existence of the Council

How do you know this is a need? *legislators call our office & ask questions (usually when prodded by Handic. Const.)*

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning *Executive Director and myself*

B. Persons for Training *Staff and selected Council members*

C. Audiovisuals *slide-tape, transparency, chalk board*

D. Organizations *No*

E. Money *Yes*

F. Print Materials *Yes*

G. Other

SPECIAL CONSTRAINTS:

legislators schedules

ORIENTATION TARGET AUDIENCE:

- [ ] New Council Members
- [ ] Existing Council Members
- [ ] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [X] Legislators
- [ ] Consumer Agencies
- [ ] Others

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [ ] Change a target's attitude
- [ ] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

To enable legislators to better make informed decisions regarding legislation effecting the handicapped.

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [ ] Large Group
- [X] Small Group
- [ ] Individual

* * * * * * *

- [ ] Case Study
- [X] Lecture
- [ ] Panel
- [ ] Simulation
- [ ] Interviews
- [ ] Group Discussion
- [X] Other *demonstrations*

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s) *Holiday Inn Breakfast - Fall*
2. Transportation *Provide own*
3. Equipment and Ordering Materials *SCRIP term. A-V*
4. Communications *Letters*
5. Budgeting & Reimbursements *Room only, breakf.*
6. Hotel Accomod.

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:
   - [ ] Feedback Sheets
   - [X] Interview
   - [X] Participant-Observers
   - [ ] Test
   - [ ] Other
2. Follow-up Activities Desired:
   X Yes __ No __ Maybe

   If yes or maybe, what activities might be needed:
   Letters & selected visits or calls by Council members

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task *His. DD Leg.*
   Person *Eliz. Boggs*
   Timeline *10-15min.*
2. Task *DD Med. Prob.*
   Person *Dr. Taft*
   Timeline *10-15min.*
3. Task *SCRIP Demo*
   Person *Claude Doak*
   Timeline *10-15min.*
4. Task *A-V present.*
   Person *Sue Howell*
   Timeline *10-15min.*
5. Task *Deinstitutiona.*
   Person *Ms. Mahneke*
   Timeline *10-15min.*

** TYPE II **

ORIENTATION AREA OR TOPIC: Update on Federal legislation and State translation

DATE: November 30, 1975

COUNCIL TRAINING COORDINATOR: Helen Amour

STATE: Washington

STATEMENT OF ORIENTATION NEED:

Council needs a beg. yardstick for new directions

How do you know this is a need. New leg. not familiar to Council members

ORIENTATION TARGET AUDIENCE:

- [ ] New Council Members
- [X] Existing Council Members
- [ ] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [ ] Others

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [X] Change a target's attitude
- [X] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

Comparative analysis of old and new bills
Discuss key shifts of concepts
Develop the "new" role of the Council
Design new directions goals, priorities, actions

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning: Helen Amour and executive committee
B. Persons for Training: CMDRC staff
C. Audiovisuals: DD/TA Video-tape transp.
D. Organizations: DD/TA TBA
E. Money: Counc. plann. funds $2,500
F. Print Materials: DD/TA Notebook
G. Other: Votes, Publicity

SPECIAL CONSTRAINTS:

Architectural barriers
Time

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [X] Large Group
- [X] Small Group
- [X] Individual

* * * * * * *

- [ ] Case Study
- [X] Lecture
- [ ] Panel
- [X] Simulation
- [X] Interviews Round Robin
- [X] Group Discussion Force Field
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s): Orchas (is.) November
2. Transportation: Auto Ferry
3. Equipment and Ordering Materials: AV & Print mat.
4. Communications: Amour & Exec. Comm.
5. Budgeting & Reimbursements: Staff & exec. comm.
6. Hotel Accomod.: Rosario

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:
   - [X] Feedback Sheets
   - [X] Interview
   - [ ] Participant-Observers
   - [ ] Test
   - [ ] Other
2. Follow-up Activities Desired: X Yes __ No __ Maybe

If yes or maybe, what activities might be needed:
About May 76 Exec. Comm. Score Card on product/status report; Council members reassessed; provide follow-up material

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task: Logistics — Person: Council staff — Timeline: 9/20
2. Task: Obtain approv. — Person: Amour — Timeline: 9/12
3. Task: Coun. Present. — Person: Amour — Timeline: 9/25
4. Task: Dev. Content — Person: Ziegler/Amour — Timeline: 10/15
5. Task: Do It! — Person: Amour/Ziegler — Timeline:

** TYPE II **

ORIENTATION AREA OR TOPIC: Existing legislation - What impacts on DD — DATE: August 7, 1975

COUNCIL TRAINING COORDINATOR: Allen Cohen — STATE: Virginia

STATEMENT OF ORIENTATION NEED:

What is legislative process? How can DDC impact leg. (beforeafter) How can DDC make sense of leg.&regs.? Understand &ensure legal rts. of DD How do you know this is a need? Knowledge that Council's role is not clear and service is not available

ORIENTATION TARGET AUDIENCE:

- [ ] New Council Members
- [X] Existing Council Members
- [ ] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [X] Others Staff

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [ ] Change a target's attitude
- [X] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

To increase Council's knowledge about the legislative process and the legislation that impacts on DD in order for the Council to act effectively in insuring that the human and legal rights of the DD are established and provided

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning: Council staff & legislative comm.

B. Persons for Training: Staff, Marchand, Hammer, Benson

C. Audiovisuals: videotape, trnsl., overhead

D. Organizations: NCP NARC, DD/TAS

E. Money: $1,500

F. Print Materials: Legs. Regs.& interpt. Expo.

G. Other

SPECIAL CONSTRAINTS:

Time

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [X] Large Group
- [X] Small Group
- [ ] Individual

* * * * * * *

- [X] Case Study
- [ ] Lecture
- [ ] Panel
- [X] Simulation
- [ ] Interviews
- [X] Group Discussion
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s): Richmond 9/24 or 26
2. Transportation: Each on his own [pd. by Council]
3. Equipment and Ordering Materials: Staff
4. Communications: Staff
5. Budgeting & Reimbursements: Staff
6. Hotel Accomod.: Staff

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:
   - [X] Feedback Sheets
   - [ ] Interview
   - [X] Participant-Observers
   - [ ] Test
   - [X] Other: Group Discussion
2. Follow-up Activities Desired: [X] Yes [ ] No [ ] Maybe

If yes or maybe, what activities might be needed: On-going legislative comm. doing things specified in purpose

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task: Leg. &Comman. Person: Mrs. Miller Timeline: 8/31/75
2. Task: Program cont. Person: Allen Cohen Timeline: 8/25/75
3. Task: Mat. & equip. Person: Mrs. Dowdy Timeline: 9/15/75
4. Task: Evaluation Person: John Haack Timeline: 9/15/75
5. Task: Reimbursements Person: Mrs. Dowdy Timeline: 9/24or26/75

** TYPE II **

ORIENTATION AREA OR TOPIC: Implications of New DD Legislation

DATE: September 11, 1975

COUNCIL TRAINING COORDINATOR: Public Information and Education Committee

STATE: Illinois

STATEMENT OF ORIENTATION NEED:

Council members are unaware of implications of new legislation as it relates to their collective & individual responsibilities

How do you know this is a need? Past experience commonly accepted

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning: Council & staff

B. Persons for Training: State, Regional & National DD staff

C. Audiovisuals: DD/TA staff

D. Organizations: DD/TA

E. Money: $2,000

F. Print Materials: Leg. Reg. notebook

G. Other: Two films

SPECIAL CONSTRAINTS:

ORIENTATION TARGET AUDIENCE:

- [ ] New Council Members
- [X] Existing Council Members
- [X] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [X] Others: State agency Council members

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [X] Change a target's attitude
- [ ] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

To increase knowledge base of Council members (especially state agency members) in order to give positive reinforcement for the active participation in accepting their responsibility as Council members

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [X] Large Group
- [X] Small Group
- [ ] Individual

* * * * * * *

- [X] Case Study
- [ ] Lecture
- [X] Panel
- [ ] Simulation
- [ ] Interviews
- [X] Group Discussion
- [X] Other: Films

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s): A Univ. w/ 90days of new legs.
2. Transportation
3. Equipment and Ordering Materials
4. Communications
5. Budgeting & Reimbursements
6. Hotel Accomod.

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:
   - [X] Feedback Sheets
   - [ ] Interview
   - [X] Participant-Observers
   - [ ] Test
   - [ ] Other
2. Follow-up Activities Desired:
   X Yes __No __Maybe

   If yes or maybe, what activities might be needed:

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task: Logistics
   Person: Staff
   Timeline:
2. Task: Design Prog.
   Person: Committee
   Timeline:
3. Task:
   Person:
   Timeline:
4. Task:
   Person:
   Timeline:
5. Task:
   Person:
   Timeline:

** TYPE II **

ORIENTATION AREA OR TOPIC *Council Functions and Operations* DATE *August 7, 1975*

COUNCIL TRAINING COORDINATOR *Nancy Smith and Micken Talleu* STATE *South Carolina*

STATEMENT OF ORIENTATION NEED:

Members have expressed the need to know the functions of the Council and what methods to use in achieving effectively

How do you know this is a need? *Members continue to indicate they don't know what to do or how to do it*

RESOURCES FOR CONTENT DEVELOP. & IMPLEMENT.

A. Persons for Planning *SC UAF, DD/TA P. A. Committee*

B. Persons for Training *UAF & DD Planning Office*

C. Audiovisuals

D. Organizations *DD/TA DDD, Senate Comm.*

E. Money *$2,500*

F. Print Materials *DD Orient. Man. for SC*

G. Other

SPECIAL CONSTRAINTS:

Special arrangements for blind member

ORIENTATION TARGET AUDIENCE:

- [X] New Council Members
- [X] Existing Council Members
- [ ] Admin. Agency Personnel
- [ ] Other Implementing Agency Personnel
- [ ] Legislators
- [ ] Consumer Agencies
- [ ] Others

PURPOSE(S) OF ORIENTATION:

- [X] Increase a target's knowledge or information base
- [ ] Change a target's attitude
- [ ] Develop a target's skill
- [ ] Other

PURPOSE STATEMENT(S):

To provide the members with current information on DDSA, how it operates, what Council relationship is to state agencies and DD population, and to encourage members into a total participation attempting to change their attitudes toward each other and toward the program in general

GENERAL IMPLEMENTATION ACTIVITIES:

A. Techniques to be Selected, Planned for and Implemented

- [ ] Large Group
- [ ] Small Group
- [ ] Individual

* * * * * * *

- [ ] Case Study
- [ ] Lecture
- [ ] Panel
- [ ] Simulation
- [ ] Interviews
- [ ] Group Discussion
- [ ] Other

B. Logistics to be Dealt with and Implemented

1. Meeting Place & Date(s) *Hilton Head Island, 10/75*
2. Transportation *Members furnish own*
3. Equipment and Ordering Materials *Dev. Orient. Hdbk.*
4. Communications *Planning staff*
5. Budgeting & Reimbursements *SCDD Plann. staff*
6. Hotel Accomod. *Hilton Head Island*

C. Evaluation and Follow-up Activities to be Planned for & Implemented

1. Evaluation Format:
   - [X] Feedback Sheets
   - [ ] Interview
   - [ ] Participant-Observers
   - [ ] Test
   - [ ] Other
2. Follow-up Activities Desired:
   X Yes __ No __ Maybe

If yes or maybe, what activities might be needed: *Continue up-dating orient. notebook, develop format on smaller scale for new members appointed after seminar*

PERSONNEL ASSIGNED TO CARRY OUT GENERAL IMPLEMENTATION TASKS:

1. Task *Determine Obj.*
   Person *P.A.Comm.*
   Timeline
2. Task *State procedu.*
   Person *P.A. Comm.*
   Timeline
3. Task *Physical Arran.*
   Person *P.A. Comm.*
   Timeline
4. Task *Dev. Man. Info.*
   Person *P. A. Comm.*
   Timeline
5. Task *Conduc. sess.*
   Person *P. A. Comm.*
   Timeline

current status of orientation training

CURRENT STATUS OF ORIENTATION TRAINING

JoHannah Adams

DD/TAS

In order to facilitate both DD/TAS's responsiveness to State Councils in the area of orientation training as well as to assess "on going" orientation training activities, several follow-up activities were implemented.

Initially a DD/TAS "warmline," through JoHannah Adams, was established to receive requests for orientation training assistance. Assistance was to be provided in areas such as planning an orientation program, identifying appropriate consultants or acquiring training materials. Requests for specific information were directed to the appropriate staff person.

Additionally a flyer describing and illustrating the three Conferences was prepared and distributed to DD Councils. A summary report of the Conferences was also sent to all states who were unable to participate in the Conferences.

Within two months after completion of the Conferences DD/TAS conducted a brief survey of all those who had attended. The purpose of this survey was to find out how individual states were progressing with the plans developed at the Conferences - as well as with any additional plans that had been developed.

DD/TAS received responses from 31 out of the 37 states who attended the Conferences. Of those responding, 11 had by the time of the survey conducted some form of orientation training for their Council. Thirteen states responded that they had plans for conducting training of this sort some time in the future, while only seven states had neither conducted nor were planning any orientation activities.

General orientation or re-orientation predominated as the theme of state sessions. A total of 11 states listed general orientation training with four of these focusing their orientation on new Council members.* Six other states listed orientation activities dealing with the new legislation.** Other orientation topics included: The Role of the Council, The Relation of Council to State Agencies and Regions (VT), Planning, Advocacy and Legislation (Maine), Training in the Specific Disabilities (NJ), Habilitation Strategies (Maryland), and Statewide Pre-School Programs (WY).

A variety of modes was used for presenting these topics. Lectures supplemented by audiovisuals, such as overheads, represent one much-used mode of training. Small group discussion, role-playing, and the round-robin technique were other mentioned training methods. Many Councils used videotape, film, or slide presentations to supplement their training activities.

*General Orientations - N.C., V.I., P.R., Delaware, Colorado, Nevada, Kansas. Especially for new members - LA, Montana, Minnesota, N.M.

**Iowa, Washington, Mississippi, VA, Maine, California.

The Council itself was the target audience in almost every state that conducted training. Many states, however, included other groups such as the professional staff of DD agencies, consumer groups, representatives from the governor's office, and special committees.

The cost of conducting orientation varied from state to state. Many spent only a few dollars while some spent several thousand. Time allotted to orientation also varied from in some states only a couple of hours to in others as much as four days. In most of the states reporting, the training was planned and conducted by the staff and persons who had attended the Conferences. In a small number of states, outside sources such as consultants or UAFs were utilized in planning the training.

Most Councils cited the Orientation Training Notebook as the most helpful of the printed materials provided at the Conference. Several states went on to complete their own version of the Orientation Notebook. A great number of Councils reported that they also used other printed materials, especially the Advocacy Document and the Themes and Issues papers.

The general response in all the states conducting orientation activities was good - with several states citing an excellent response. About six of the states solicited evaluations with questionnaires or forms while others relied on verbal responses.

In general the strengths of these activities seemed to be in their careful preparation and the informative nature of the presentations. The mode or technique of the presentation was cited as an eqully important asset. The weaknesses of the orientation activities were usually associated with Council resistance and/or problems of logistics.

appendices

APPENDIX I

CONFERENCE AGENDAS

AGENDA -- CHAPEL HILL

Conference on Training for Council Orientation

Tuesday, August 5	Room #	Chairperson, Ron Wiegerink
12:30pm		Lunch with Conference Staff
1:15pm		Conference Staff Meeting --Jim Paul, coordinator
5:00pm	North Parlor Carolina Inn	Reception and Registration
7:30pm	Lg. Conference Rm. 5th Fl., NCNB Plaza	Welcome/introductions, rationale for Conferences -- Jane Belau, Ron Wiegerink (late registration)
7:45pm	"	Overview of Conference design, objectives, agenda --Ron Wiegerink
8:00pm	"	Presentation by Marge Kirkland, Deputy Director of DD Office, Washington, DC - on federal structure
8:30pm	"	Update on status of legislation --Gary Richman, Paula Hammer, Jane Belau
9:30pm	"	Brief meeting between two state teams and DD/TAS planning assistants
Wednesday, August 6		Chairperson, Pat Trohanis
9:00-10:00am	Lg. Conference Rm. 5th Fl., NCNB Plaza	Presentation on Planning for Orientation --Gene Watson
10:00-10:15am	"	Overview to Orientation Kit (Part of Kit distributed) Charge - to compile questions new Council members might ask --Gary Richman, Paula Hammer
10:15-10:45am	"	Break and Work
10:45-11:45am	"	Introduction to Orientation Notebook --Gary Richman, Paula Hammer

11:45-1:30pm	Lg. Conference Rm. 5th Fl., NCNB Plaza	Checkpoint and Lunch with planning assistants
1:30-1:45pm	"	General Session--Introduction to training groups; assignment of next activity --Pat Trohanis
1:45-3:15pm	NCNB	1st Rotation of Training Groups 1. 2. 3. 4.
3:15-3:45pm	NCNB	Checkpoint
		Dinner
8:00pm	Lg. Conference Rm. 5th Fl., NCNB Plaza	Presentation by Jane Belau on ABC's of DD and Practical Politics
9:00-11:00pm	Club Room Carolina Inn	Social Hours
9:00-10:00pm	Sm. Conference Rm. 5th Fl. NCNB Plaza	Films Available Upon Request
Thursday, August 7		Chairperson, Pat Trohanis
8:45-9:00am	Lg. Conference Rm. 5th Fl. NCNB Plaza	Good Morning --Pat Trohanis
9:00-10:30am	NCNB	2nd Rotation of Training Groups 1. 2. 3. 4.
10:30-11:00am		Break
11:00-12:15pm	Lg. Conference Rm.	Large group demonstration on planning for orientation --John Pelosi, Roy Brun[illegible]ghaus
12:15-2:00pm		Lunch
2:00-2:10pm	Lg. Conference Rm.	General Session --Pat Trohanis, coordinator
2:10-5:00pm	NCNB	State Team Planning groups
		Dinner
8:00-8:15pm	Lg. Conference Rm.	Charge! --Pat Trohanis

Thursday, August 7 (cont.)

8:15-9:30pm	NCNB	Orientation Simulation: group designing

Friday, August 8 — Chairperson, Don Stedman

Breakfast		Morning chairperson breakfasts with participant group leaders
8:30-9:00am		Checkout from hotel taken care of
9:00-10:30am	Lg. Conference Rm. 5th Fl. NCNB Plaza	Orientation Simulation: group presentations
10:30-10:45am	"	Coffee Break
10:45-11:30am	"	Presentation by Don Stedman on Advocacy
11:30-12:00n	"	Conference wrap-up and distribution of state team plans --Ron Wiegerink, Allen Cohen

TRAINING GROUPS: 1st Rotation -- Wednesday, August 6, 1:45pm-3:15pm
2nd Rotation -- Thursday, August 7, 9:00am-10:30am

Training Group	Coordinator(s)	Meeting Room
1. Alternative Approaches to Deinstitutionalization: Council Subgroup Negotiation and Role Play Exercises	Jim Paul	Lg. Conference Rm. 5th Fl., NCNB Plaza
2. Public Awareness Planning: Case Study and Consultation	Pat Trohanis, Gary Richman	Pat Trohanis' Office 3rd Fl., NCNB Plaza
3. Force Field Analysis: Developing an Effective Problem Solving Strategy	Paula Hammer	Ron Wiegerink's Office 3rd Fl., NCNB Plaza
4. Round-Robin Discussion of Council Decision Making and Effectiveness	Ron Wiegerink	Sm. Conference Rm. 5th Fl., NCNB Plaza

FILMS AVAILABLE UPON REQUEST: Wednesday, August 6, 9:00pm-10:00pm
Sm. Conference Rm., 5th Fl., NCNB

1. "Coming Home"
2. "Like Other People"
3. "Lisa's World"
4. "A Time for Georgia"

AGENDA -- TIMBERLINE LODGE

Conference on Training for Council Orientation

Tuesday, August 19	Chairperson, Ron Wiegerink
3:00pm	Registration for Conference participants
3:00pm	Conference staff meeting --Jim Paul, coordinator
5:00pm	Free time and Dinner
7:30pm	Welcome/introductions, rationale for Conferences --Jane Belau, Ron Wiegerink
7:45pm	Overview of Conference design, objectives, agenda --Ron Wiegerink
8:00pm	Update on status of legislation --Gary Richman, Jane Belau
9:00pm	Presentation by Jane Belau on the ABC's of DD and Practical Politics
9:45pm	Brief meeting between two state teams and DD/TAS planning assistants
Wednesday, August 20	Chairperson, Ron Neufeld
8:30-9:40am	Presentation on Planning for Orientation --Don Stedman
9:40-10:00am	Overview to Orientation Kit (part of Kit distributed) Charge--to compile questions new Council members might ask --Gary Richman
10:00-10:30am	Break and Work
10:30-11:15am	Introduction to Orientation Notebook --Gary Richman, Alice Peery
11:15-11:30am	Checkpoint with planning assistants
11:30-1:00pm	Lunch

Wednesday, August 20 (cont.)

1:00-1:15pm	General Session -- Introduction to Training Groups; assignment of next activity --Ron Neufeld
1:15-2:45pm	1st Rotation of Training Groups: 1. 2.
2:45-3:15pm	Checkpoint--get data on Training Groups and participants' evaluation of presentations
3:30pm	Conference staff meeting --Jim Paul, coordinator
	Dinner
8:00pm	Optional Film Theater -- available upon request (see final page of agenda): Like Other People, Coming Home, A Time for Georgia, "Legislation Report"
9:30-11:00pm	Social Hours

Thursday, August 21 — Chairperson, Ron Neufeld

8:30-8:45am	Good Morning --Ron Neufeld
8:45-10:15am	2nd Rotation of Training Groups: 3. 4.
10:15-10:30am	Break
10.30-11:45am	Large demonstration on planning for orientation --John Pelosi
11:45-12:00n	Conference staff meeting --Jim Paul, coordinator
11:45-1:15pm	Lunch
1:15-1:30pm	General Session --Ron Neufeld, coordinator
1:30-4:30pm	State Team Planning Groups
4:45-5:15pm	Conference staff meeting --Jim Paul, coordinator
	Dinner

Thursday, August 21 (cont.)

8:00-8:15pm	Charge! --Ron Neufeld
8:15-9:30pm	Orientation Simulations: Group Designing
Friday, August 22	Chairperson, Ron Neufeld
Breakfast	Morning chairperson breakfasts with participant group leaders
8:30-9:00am	Checkout from Lodge taken care of
9:00-10:30am	Orientation Simulations: Group Presentations
10:30-10:45am	Coffee Break
10:45-11:30am	Presentation by Don Stedman on Advocacy
11:30-12:00n	Conference wrap-up and distribution of state team plans --Ron Neufeld, Michelle Morrison

Optional Film Theater

Like Other People. The most sensitive and hard-hitting film on the subject of normalization. A British-made documentary of a young cerebral palsied couple who are in love and demand the right to a full life. (42 min., color)

Coming Home. A community reacts to the presence of a group home in their neighborhood. (20 min., color)

A Time For Georgia. A look at a four year old autistic girl and her preschool program. (15 min., B&W)

AGENDA -- PHEASANT RUN

Conference on Training for Council Orientation

Tuesday, September 9	Chairperson, Ron Wiegerink
1:00pm	Registration for Conference participants
2:00pm	Conference staff meeting --Pat Trohanis, coordinator
5:00pm	Free time and Dinner with planning assistants
7:30-7:45pm	Welcome/introductions, rationale for Conferences --Jane Belau, Ron Wiegerink
7:45-8:15pm	Overview of Conference design, objectives, and agenda --Ron Wiegerink
8:15-9:15pm	Update on status of legislation --Gary Richman, Jane Belau, Paula Hammer
9:15-10:00pm	Presentation by Jane Belau on Practical Politics
10:00pm	Social Hours
Wednesday, September 10	Chairperson, Ron Wiegerink
8:30-9:50am	Presentation on Planning for Orientation --Don Stedman
9:50-9:55am	Charge--to compile questions new Council members might ask --Gary Richman, Paula Hammer
9:55-10:15am	Break and Work
10:15-11:15am	Introduction to Orientation Notebook and Kit --Gary Richman, Paula Hammer
11:15-11:30am	Checkpoint with planning assistants
11:30-1:15pm	Lunch with speaker General Session--Introduction to Training Groups; assignment to next activity --Ron Wiegerink

Wednesday, September 10 (cont.)

1:15-2:45pm	1st Rotation of Training Groups: 1. 2. 3. 4.
2:45-3:15pm	Checkpoint--get data on Training Groups and participants' evaluation of presentations
3:30pm	Conference staff meeting --Pat Trohanis, coordinator
	Dinner
8:00-9:00pm	Presentation by Don Stedman on Advocacy
9:15-11:00pm	Optional Film Theater -- available upon request A Time For Georgia Bertha Like Other People
	Social Hours

Thursday, September 11 — Chairperson, Ron Neufeld

8:30-8:45am	Good Morning --Pat Trohanis
8:45-10:15am	2nd Rotation of Training Groups: 1. 2. 3. 4.
10:15-10:30am	Break
10:30-11:45am	Large group demonstration on planning for Orientation --Pat Trohanis, Roy Bruninghaus
11:45-12:00n	Conference staff meeting --Pat Trohanis, coordinator
11:45-1:15pm	Lunch
1:15-1:30pm	General Session --Ron Neufeld, coordinator
1:30-4:30pm	State Team Planning groups
4:45-5:15pm	Conference staff meeting --Pat Trohanis, coordinator

Thursday, September 11 (cont.)	
	Dinner
8:00-8:15pm	Charge! --Ron Neufeld
8:15-9:30pm	Orientation Simulations: Group Designing
Friday, September 12	Chairperson, Ron Neufeld
Breakfast	Morning chairperson breakfasts with participant group leaders
8:30-9:00am	Checkout from Hotel taken care of
9:00-11:00am	Orientation Simulations: Group Presentations
11:00-12:00n	Conference wrap-up and distribution of state team plans --Ron Neufeld

APPENDIX II

ANNOTATED LIST OF RESOURCES

ANNOTATED LIST OF RESOURCES

The following is an annotated list of the material provided to Conference participants.

A. The Orientation Notebook: A Resource Guide for members of State and Territorial Developmental Disabilities Councils perpared by Paula Hammer and Gary Richman.

The Notebook is intended as an introductory textbook or basic reference work, depending upon the Council members' needs. The following chapters are included: The Population; The Councils; The Political Ecology; The Human Service Ecology; a Glossary; The State Ecology; and Other Issues. The last two chapters include recommendations, but it is primarily the responsibility of the Council to supply the information necessary for their own state. The Notebook includes update pages that can be changed as legislation and other structures or issues change.

The following supplementary materials were included in the Notebook:

1. Simplified Parliamentary Procedure based on Robert's Rules of Order

2. The Budget Process From the Bureaucrat's Side of the Desk - League of Women Voters

3. The Governor, the Office and its Powers - the Council of State Governments

4. Social Services '75: A Citizen's Handbook to Title XX of the Social Security Act - League of Women Voters

5. Going to Court in the Public Interest: A Guide for Community Groups - League of Women Voters

6. Getting involved: Your Guide to Reveune Sharing - Office of Revenue Sharing

7. What are the Facts About Cerebral Palsy - United Cerebral Palsy Associates, Inc.

8. Mental Retardation by Donald Stedman

9. Consensus: The Majority Professional View on Several Key Questions about Epilepsy - Epilepsy Foundation of America

10. Anatomy of a Hearing - League of Women Voters

11. Federal Register: Developmental Disabilities Program and Grants for Initial Staffing of Community Mental Health Retardation Facilities

12. P. L. 91-517

13. You and Your National Government - League of Women Voters

14. When You Write to Washington - League of Women Voters

15. How our Laws are Made - Charles J. Zinn

16. The Federal Budgetary Process as Amended by "the Congressional Budget and Impoundment Control Act of 1974"

17. Excerpts: The U. S. Congress Handbook 1975

18. "Learning Disabilities" from The Futures of Children

19. Facts and Issues - Reform: Does Congress Need It? - League of Women Voters

20. Facts and Issues - U. S. Congress: Architects of Compromise or Agents of Change? - League of Women Voters

21. Fact Sheet on the Handicapped: Autism

E. In addition to the Notebook the following supplementary materials were distributed:

1. Adult Education Procedures: A Handbook of Tested Patterns for Effective Participation. Paul Bergevin, Dwight Morris, Robert M. Smith, New York: Seabury Press. 1963.

This book discusses a number of different training techniques in addition to the ones demonstrated in the course of the Conference. It is designed principally to aid in the selection, planning and conducting of activities for effective training.

2. Advocacy: A Role for DD Councils, James L. Paul, Ronald Wiegerink, G. Ronald Neufeld, Eds., DD/TAS, 1975.

Material in this document was developed out of a National Conference on Initiative Functions of Developmental Disabilities Councils sponsored by DD/TAS. Chapters in the monograph include: Advocacy Potential; Consumer as Advocate; Planning and Evaluation; Consumerism; Regionalism; Reveune Sharing; Public Awareness; Legal Developments: Legal Issues; and Deinstitutionalization. The appendices include descriptions of the structure and rationale of the Conference and list Conference staff, consultants and participants.

3. Recommendations for Guidelines for a National Public Awareness Effort for DD, Ruder and Finn, Inc., DD/TAS, 1975.

The first chapter of the report discusses the overall task, program assessments and approaches. The second chapter explores the multiple considerations involved in program design and planning. Program

recommendations are featured in the third chapter. Finally, the last chapter deals with issues of implementation and cost.

4. Synergism for the Seventies, Proceedings of the Conference for State Planning and Advisory Councils for the Developmentally Disabled, Reston, Virginia: Council for Exceptional Children, 1973.

This document is the Conference proceedings of the National Conference for State Planning and Advisory Councils on Services and Facilities for the Developmentally Disabled and includes chapters on planning and evaluation, reaching special populations among developmentally disabled people using other federal resources, state legislative and administrative action, special services, future national strategy, delivery of services, state advisory Councils, and innovative programs and sources of funds.

5. Themes and Issues, James L. Paul, Pascal Trohanis, Eds., DD/TAS, 1975.

The first three of an on-going series of topical papers on Developmantal Disabilities were distributed.

1. "The State Planning and Advisory Council on Developmental Disabilities", by Donald J. Stedman

2. "Relationships Between A Developmental Disabilities Council and State Service Agencies", by Andrew S. Halpern.

3. "Dimensions of Early Detection of Developmental Disabilities", by John H. Meier.

Subsequent issues being currently developed include:

4. "Insuring the Legal Rights of the Developmentally Disabled", by Donald O. Mayer.

5. "Role of the Consumer in Planning and Delivering Services", by Frank Warren

APPENDIX III

EVALUATION REPORT

Conference Evaluation

Each participant was asked to complete and return a Conference evaluation form, which provided feedback as well as valuable suggestions for modifications in the Conference design.

As stated previously, the four major goals of the Conference were:

1. To develop skills in a two-person team from each DD Council in orientation techniques and methodologies.

2. To introduce each team to a "resource kit" of materials on developmental disabilities to support their own Council's orientation activities.

3. To assist each team to prepare a plan which would identify and meet the orientation needs of their Council.

4. To facilitate responsive and appropriate follow-up to teams in implementing their orientation plan.

Table 1 demonstrates the extent to which these goals were met, as rated by the participants attending each Conference. Responses indicate that, with only two exceptions, all of the participants considered that the four goals were either "met" or "partially met" at each Conference. Additionally, an average of 77% of the responses reflect that all goals were considered "met." Goal 4 received the highest proportion of "partially met" responses (50%, 23.5%, and 44% for the three Conferences), which indicates ambiguity about the nature and extent of DD/TAS' follow-up support. This goal is understandably difficult to assess "before the fact" of follow-up activities.

Each participant was asked to list the aspects of the meeting which were most beneficial as well as those which were of least use. Among the aspects frequently mentioned as being of most benefit were: the resource materials (particularly the Orientation Notebook); the individual planning assistant assigned to each team; the variety of techniques demonstrated; the high level of interaction among state Council representatives and between staff and participants; and the opportunity for active involvement in the training processes.

In responding to the question of which aspects were found to be "least useful", the participants most frequently indicated: the lack of free time in which to informally exchange ideas and information with Council members from other states; the length of the Conference; lack of clear indication of follow-up; and evening sessions. Forty-two per cent (42%) of those completing the evaluation forms did not respond to this question.

Additionally, participants were asked to rate several aspects relating to arrangements for the meetings. As illustrated in Table 2, those attending each Conference rated (either good, adequate, inadequate) the advance information, timing, location, and agenda. Advance information proved to be the aspect which received the widest range in ratings across all three of the

meetings. The process of sending information prior to the meetings was complicated in some instances by late changes and/or additions of participants. Both agenda and timing were highly rated with fair consistency (80% of participants at all three meetings ranked these aspects as "good"). The greatest variance appeared regarding the location of the Conferences. While 94% of those completing evaluations considered the Conference site at Timberline Lodge (near Portland) to be "good," the comparative rating of Pheasant Run was only 22% "good," 22% "adequate," and 56% "inadequate." The poor rating of the Pheasant Run site appeared to result both from the expense and size which may have hindered the close interaction experienced at the smaller Timberline Lodge. The Chapel Hill location was generally favorably regarded with all participants considering it "good" or "adequate."

General comments indicate that many of the participants left the meetings both with new skills and information and with renewed energy for working with their own Councils. Several unsolicited letters received since the meetings reinforce this impression.

TABLE 1

Evaluation of Conference Goals

Location	Chapel Hill			Timberline			Pheasant Run		
Evaluation	Met	PM	NM	Met	PM	NM	Met	PM	NM
Goal 1	N=16 80%	4 20%	0 0	N=15 83%	2 11%	0 0	N=13 72%	5 28%	0 0
Goal 2	N=20 100%	0 0	0 0	N=17 100%	0 0	0 0	N=15 83%	3 17%	0 0
Goal 3	N=15 83%	2 11%	1 6%	N=14 82%	3 18%	0 0	N=12 67%	6 33%	0 0
Goal 4	N=10 50%	9 50%	0 0	N=12 70%	4 23.5%	1 6.5%	N=9 56%	7 44%	0 0

PM - Partially Met
NM - Not Met

TABLE 2

Evaluation of Conference Details

Location	Chapel Hill			Timberline			Pheasant Run		
Evaluation	Good	Ad.	Inad.	Good	Ad.	Inad.	Good	Ad.	Inad.
Advance Information	N=10 55%	6 33%	2 12%	N=5 29%	7 42%	5 29%	N=6 37.5%	7 44%	3 18.5%
Timing	N=15 83%	2 11%	1 6%	N=14 82%	2 12%	1 6%	N=14 87%	1 6.5%	1 6.5%
Location	N=15 80%	4 20%	0 0	N=16 94%	1 6%	0 0	N=4 22%	22%	10 56%
Agenda	N=16 84%	3 16%	0 0	N=15 88%	2 12%	0 0	N=17 94%	1 6%	0 0